DOCUMENT RESUME

ED 340 940 CE 060 202

TITLE A Participant's Handbook for a Train-the-Trainer Program.
INSTITUTION American Federation of Labor and Congress of Industrial Organizations, Washington, D.C.
PUB DATE 91
NOTE 101p.
PUB TYPE Guides - Non-Classroom Use (055)

EDRS PRICE MF01/PC05 Plus Postage.
DESCRIPTORS Adult Education; *Adult Learning; Class Activities; Course Objectives; Educational Media; Educational Objectives; Inservice Teacher Education; Instructional Materials; *Labor Education; Needs Assessment; Program Evaluation; Questioning Techniques; Reference Materials; Team Teaching; *Trainers; *Training Methods; *Unions

ABSTRACT

This handbook for a week-long Train-the-Trainer Program is intended to provide union members with the skills to teach labor education classes. After incorporating the principles, program participants should be able to do the following: tap into the student experiences; develop teacher student communication; appreciate good industrial design; and use a variety of student-oriented approaches. The first section provides information on how to conduct student needs analysis and on the use of warm-up exercises. This section includes four appendices: a sample learning needs questionnaire survey used in Stewards Training Programs; the Alaska settlement game; the red/blue game; and an introduction type warm-ups or icebreakers. The second section discusses setting course objectives and principles of how adults learn; its appendix lists 10 general principles of learning. Instructional techniques and the effective use of questions are addressed in section 3; application of the teaching techniques used by the British Trades Union Congress and nontraditional questionnaires are appended. The fourth section addresses teaching aids, class control, and team teaching, with an appendix providing suggested responses to classroom problems. The program evaluation section includes a sample evaluation form for a labor education class. (NLA)

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AFL-CIO DEPARTMENT OF EDUCATION

A Participant's Handbook for a Train-the-Trainer Program

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A PARTICIPANT'S HANDBOOK FOR A TRAIN-THE-TRAINER PROGRAM

AFL-CIO DEPARTMENT OF EDUCATION
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INTRODUCTION

This handbook is the result of a "Train-the-Trainer" conference that developed suggestions and ideas on how to equip trade unionists with limited or no teaching experience so that they can teach other trade unionists. It is formulated along the lines of a very successful program developed by the Canadian Labour Congress. The philosophy is essentially that *"workers can best train workers."* While in some instances professional educators can teach workers on technical and complicated matters, workers with experience in a union setting are quite capable of conducting most of the courses required by a labor union. This includes such courses as: Shop Stewards Training, Collective Bargaining, Internal Organizing, Safety and Health, etc.

This handbook is intended to be the basis of a week-long Train-the-Trainer Program that provides unionists with enough skills to teach or help teach a variety of labor education classes. In addition to its use in the course, it can be a ready reference to the new instructors both during and after the formal course. This manual, however, cannot stand alone. It needs to be supplemented by instructional material on a specific course that is prepared for the trainers by the union's education department (or some other department of the national union).

It is assumed that the people undertaking this training already possess the basic knowledge about the subject -- whether it be shop stewards training, health and safety or the rudiments of internal organizing. It is further assumed that they do not have much experience in teaching methods or the principles of learning.

This handbook will **NOT** make an individual a stand-up lecturer or even skilled in leading a lecture/discussion process. It will not develop individuals in a week to be "teachers." In fact, just the opposite, it is intended to make them not teachers, but "facilitators." A facilitator is an individual who helps adults (trade unionists) learn. The facilitator interacts with the students, processes the content of the course with the students, and together with them conducts a sound educational program. In a sense the facilitator is a guide helping the students through their educational journey. While the facilitator is a learning resource person, he or she is not an administrator. There is a distinct difference between initiating a course and instructing a course.

The administrator of the Train-the-Trainer program needs to supplement this handbook with student-oriented tasks or exercises, designed to meet specific educational objectives. For example, if one of the objectives of a shop stewards training program is a "better understanding of the collective bargaining agreement" -- the administrator of the program must prepare participative exercise(s) that accomplish this objective.

In addition to these course exercises, other materials that may be supplied to the participants include course outlines, warm-up exercises, suggested time schedules, module alternatives, hints for using teaching aids and a resource guide.

The AFL-CIO Education Department has published a "Guide for Administrators of Train-the-Trainer Programs" which covers suggestions on how to set up an effective program, from the selection of individuals to be trained, to the evaluation and assessment of a completed program.

What the facilitator needs to bring to the program are certain individual qualities including: self-confidence, enthusiasm, creativity, flexibility, humor, and practicality. The facilitator must also bring to the course both technical and interpersonal skills to be effective.

The facilitator can best perform his or her role by helping the students learn through the use of student-oriented experiences; this contrasts with the traditional role of the teacher who imparts information and ideas as an "expert" on the subject.

The facilitator needs a different set of skills to be an effective instructor. Some ideal qualities include:

- The ability to establish a physical and psychological climate conducive to learning. In some cases this may be merely to reset the classroom seating; in others to emphasize the value of collaborative learning or by establishing an atmosphere of mutual trust.

- The ability to involve learners in mutual planning of methods and directions. People will make firm commitments to activities in which they feel they have played a participatory, contributory role.

- The ability to assist participants in diagnosing their own learning needs.

- The ability to assist learners in formulating useful learning objectives.

- The ability to encourage learners to identify education resources and to devise strategies for using such resources in future education programs.

- The ability to determine whether the course activities have helped improve the skills, knowledge and abilities of the participants, so that they can effectively and confidently utilize what they have learned when they return to the local unions.

What this handbook **will do** is to help the facilitator determine course/session objectives based on the needs of their members; it will show them how to use basic teaching tools and how to handle a class; and it will suggest ways in which they can evaluate the effectiveness of the course.

It will provide them with certain instructional techniques that will help them put the teaching model into effect. Specifically it will: 1. help develop an understanding of the principles of a student-oriented approach to teaching versus the traditional instructor-led approach; 2. demonstrate how to make the most out of the use of small groups (buzz groups) as well as make suggestions on how to use a variety of participative teaching techniques; and 3. offer suggestions on how to use questions to substantiate, challenge or add to the information received from the students.

As for course objectives, after incorporating the principles of this manual, participants in a Train-the-Trainer Program should be able to:

1. Tap into the experiences of their students when presenting a course, and use these examples to encourage sound application of suggested principles. For example, how others may have handled an irate supervisor in a grievance situation should give the students ideas of how they should react in a similar situation.

2. Develop a good understanding of the characteristics of desirable two-way communication between teacher and student. This requires a good listener who can ask effective questions and field tough student questions. The instructor needs to know how to use analogies, anecdotes, examples, and parallel cases.

3. Realize the importance of a good instructional design. The definition of a "good design" is one that has the students doing their own work to achieve a learning objective. This is in contrast to the instructor presenting material to the students to achieve a learning objective. For example, through the development of good design situations the student will discover why grievances are being lost, why contract language is important, what the role of the steward should be, etc.

4. Utilize a variety of small breakout groups and similar student-oriented approaches. By providing these cooperative learning experiences the instructor responds to student suggestions, not the other way around. These approaches also demonstrate other learning experiences apart from the traditional instructor-controlled process. It is important to understand that students can learn from each other and that the teacher is not the only source of knowledge.

Finally, there are a limited number of labor educators and an almost unlimited demand for labor education, therefore, one of the best ways to solve this dilemma is to increase the supply of instructors. This handbook intends to assist in this purpose.

SECTION 1

NEEDS ANALYSIS AND THE USE OF WARM-UP EXERCISES

How to Determine What the Students Need to Learn

The first step in an instructional program is to determine the educational needs of the students. What do they need to know or be able to do or be able to change? An illustration from the traditional shop stewards manual[1] will be used to show the difference between a program that assumes the instructor knows the students' needs and a program that actually determines the real needs of the students.

The standard stewards program assumes that what the steward needs to know are the Five W's: who, what, when, where and why. This may, in fact, be a primary need of the students, but it may be subordinate to other needs. For example, the steward may not understand the key clauses in the contract, or may not know how to handle the foreman, or may not know what the steward's legal rights are under the law. A good needs analysis will insure that the course zeroes in on the real problems facing the steward and not the preconceived problems. As someone said: *"An ounce of analysis is worth a pound of programming."*

Perhaps the worst way to assess needs is to ask the person directly: *"What are your needs?"* Ask this of your typical steward prior to a training program, and you might get this response: *"I want to be able to win more grievances in the first step."* Notice the verb *"want"* -- the typical response to this type of question -- solicits what the person wants, not what they may need to achieve this goal. They seek an objective, and do not necessarily understand what training is necessary to achieve their objectives. If they are stewards who want to improve on what they are doing, they probably do not know what they need to know to improve.

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[1] Since a number of Train-the-Trainer programs are used in conjunction with shop stewards training, that subject will be used often to illustrate a point.

Unfortunately the usual means of assessing needs (at least the ones relied on or suggested by traditional adult educators), are not available in most union classes. Normally you do not have the opportunity nor the time to interview the students as to their problems; you do not have access to conduct a pre-class survey to determine their needs; you do not have access to historical data such as the past record of their handling of shop grievances. If there is a way to do any of the above prior to a class, it certainly should be utilized; if not, an alternative method has to be used.

An alternative approach that is open to instructors in union education programs is to develop a "learning needs questionnaire/survey" (a sample used by the Canadian Labour Congress appears in Appendix A to Section 1). This is a checklist of what the person is expected to know, understand or what has been a problem in the past. The one major problem with this approach is that sometimes the instructor cannot anticipate all of the possible needs of the students and thereby may omit an important factor. For example, while the instructor is asking what the student would like to know *"more about"* or what they may need to *"understand"*, the stewards' problem may be that they have been asked to assume an additional role of collecting political contributions, or that a new local president has changed the relationship between the stewards and the local union officers. It takes quite a sophisticated person to devise an effective survey of needs under these circumstances.

Use of Warm-Up Exercises to Help Determine Needs

Some simple and effective techniques can give the instructor some feel for the needs of the group. The International Brotherhood of Electrical Workers (IBEW), in their stewards training program utilizes a "matched question" technique. Individuals, small groups, or the class as a whole are first asked a question such as: *"What words or phrases do your members most likely use to describe your stewards?"* These answers are then compared to the answers generated by another question asked of the same people: *"What words or phrases would you most likely use to describe your stewards?"*

Comparing the responses should help the instructor assess the extent of the "problem" or need based on the perception of the stewards' image (especially if there is a sharp distinction between the two lists).

A similar technique could be used in courses trying to overcome member apathy. The instructor could first ask: *"What are the reasons most members are not active within the union?"* Again these responses can be compared to those from this second question: *"What are the reasons that **you** are active within the local union?"* These types of matched questions not only help identify concerns (or needs), they can usually provide some clues on how to appeal to the apathetic members.

Malcolm Knowles, one of the top adult educators in the United States, uses the following technique to learn where people are coming from and also to establish a good climate setting. Knowles asks them to form small groups of four or five participants and share some things about themselves, such as:

1. What they are or do. Their present work (union) roles and their previous roles and experiences.

2. Who they are. Namely, one thing about themselves that will enable others to see them as unique human beings, different from everyone else in the room.

3. Any special knowledge, experience or resources they have that are relevant to this program and that would be useful for others to know about.

4. Any questions, problems or concerns that they hope the program will address.

After the instructor supplies his or her answers to these questions, one or two members of each group are asked to summarize what they learned about each of the other members of the group. This direct approach yields information that the instructor can utilize throughout the program.

A variation of the above is the "**lifeboat**" exercise utilized by the Canadian Labour Congress' training program. The instructor asks the class to divide themselves into four or five groups by such categories as: years of experience in the union; different sectors of the workforce; regions of the country; place of birth or position within the union. While in these small groups, individuals are instructed to introduce themselves and briefly describe the "reason" they are in the group. For

example -- if divided by years of experience in the union -- individuals would give a history of their union association. In the course of dividing the group three or four times everyone is introduced to everyone else, and the instructor learns several bits of information that will help develop group identities and to gauge the diversity within the group.

A more direct and effective technique (depending on the sophistication of the group) is to just ask the students individually (or in small groups) to think about the subject matter under discussion and identify their major concerns, such as what are the most important problems facing the stewards, or in getting members involved in the local union. Or, instead of using the problem-centered approach, the class could be asked to identify an "end product" such as: What would you (the steward) like to do better or, what would your members most likely want to get out of a shop stewards training program. With either approach, the instructor will get a good idea of the diversity of interests.

The above examples are illustrations of warm-up exercises (or icebreakers) that can be utilized by an instructor to get some idea of participant needs. Throughout the class the instructor should be constantly alert to other clues from the students as to their learning needs.

Other Uses of Warm-Ups or Icebreakers

While the emphasis above was on the use of warm-ups to help determine the needs of the group, they have a number of other rather obvious attributes. To name a few:

- To acquaint participants with each other;
- To put participants at ease;
- To get off to a good start;
- To set the stage for the program;
- To let participants know they are responsible for their learning;
- To demonstrate the kind of trainer you are.

In using warm-ups, two key points need to be adhered to:

1. **Be brief.** This is especially true in union programs where time is limited. But the opposite caution is equally important: namely, don't forego warm-ups because of time constraints. They are almost essential in student-oriented learning models, especially if the students are unfamiliar with small group processes.

2. **Have a purpose.** It's nice if the participants enjoy themselves in the game, but that is secondary to the need to reinforce some behavior. A warm-up can be an important vehicle in achieving the objectives of the course (in addition to its uses in setting a climate or making individuals comfortable with each other). A caution: while these can be excellent tools for developing concepts or techniques, they are not to be used as a substitute for the core of the program. They are only tools to enhance the major thrust of the course.

The following warm-up exercises can have direct applicability in education programs.

The first type of icebreaker is designed to give students an appreciation of the **effectiveness of working together** and the value of sharing knowledge. Several exercises are suggested to enhance the value of small groups:

> The "**Alaska Settlement Game**" exercise used in the AFL-CIO Education Department's One-on-One Program is one such warm-up (see Appendix B to Section 1). It asks the students, individually, and later in small groups, to determine what occupations are needed to establish a community in Alaska. The objective is to show that group answers are oftentimes better than individual responses.

> Another simple, small group process is to add the adverb "**very**" to a number of adjectives like hot, large, loud, small, smart, etc., and then ask the class to come up with a synonym. Again the small groups generally come up with a lot more creative ideas than any one individual.

A highly successful education consulting firm, Human Synergistics Corporation, has developed this warm-up technique to a high level of sophistication through a variety of **survival exercises** asking the class to rank items needed for survival after finding oneself stranded in the desert, in the jungle, on a mountain, etc.

A second type of warm-up attempts to **set the climate** for the course subject itself.

For a course on collective bargaining two warm-up exercises that can help get the class in the right mood are:

Chance to Win a Million Dollars -- Procedure: Six (or a proportional amount) of the participants are given a blue index card, the others in the class, 25 or so (or a proportional amount) are given white index cards. To get the opportunity to win the state lottery, participants need to find a partner who has a card of the other color, negotiate an agreement on how the million-dollar prize will be divided and present their pair of white and blue cards to the seminar leaders. The intent is to show the disparity between abundant resources - the white card holders, and the scarce resources - the blue card holders. It takes a good negotiator to work out a favorable settlement.

Red/Blue Game - is used extensively by the International Association of Machinists and Aerospace Workers (IAM) and the Canadian Labour Congress. It is particularly good in collective bargaining courses because the participants attempt to predict behavior patterns (see details in Appendix C to Section 1).

A third category deals with the **communications** warm-ups. Most everyone is familiar with the widely-used rumor or gossip exercises, which start out with someone being told a story and after several

individuals in turn relate what they heard to other class members, the final story reported out bears little resemblance to the original. If used with a relatively simple scenario, it also makes for a very good "listening" warm-up.

One communication technique involves a volunteer from the class trying to **describe a complex series of arrangements of squares** or a combination of squares and triangles to the class. Often this is done in two steps -- one where the class cannot ask any questions, the next where questions are accepted (two-way communication).

Many variations of this technique exist. It is best used in small groups. The volunteer is given the task of describing a figure to the other participants; the participants must draw the figure according to the description given. The volunteer faces away from the group and describes the figure orally. That is, he or she may not draw the figure or use any type of visual aids. Also, the participants may not ask questions or make comments. Thus, the communication is "one-way".

Next, the process is repeated but varied. The same volunteer has the task of describing a different (or the same) figure for the participants to draw. However, this time the volunteer faces the group and the participants are able to ask questions. That is, the communication is "two-way".

Comparisons can then be made of the different levels of accuracy between the processes to illustrate the value of two-way communication.

The final category of warm-up exercises deals with **problem-solving skills**. This could involve any number of puzzles or brainteasers that can be found in any of a number of texts. One technique is to give the same puzzle to three or four small groups and have them compete against each other. It certainly heightens the intensity of the exercise.

Here is a specific **problem-solving exercise** that can suggest resolution of real life situations. Before beginning the game, come up with four or five problems (or sub-problems within a larger dilemma) for the group to solve. Divide the group into teams and assign each one an envelope on which you've written a statement of one of the problems. Give the teams a designated period of time in which to write down, on the outside of the envelope--not solutions to the problem--but criteria for evaluating solutions. That is, have them decide how they would determine whether the solution is acceptable. For example, if the problem is lack of membership participation--what two or three points (criteria) would determine if the solution really would increase participation? Similarly, if the problem is "ineffective shop stewards" -- how would you determine if the solution "would create" effective stewards?

Once they've done so, ask each team to pass the problem envelope to the next team. Then instruct the teams to come up with a suitable solution and write it on a 3 x 5 card. At the end of the time limit for this task, ask the teams to put the solution cards into the problem envelopes and pass them to the next team. Without looking inside the envelope, each team must then come up with its own solution.

Repeat this procedure until each envelope returns to the team that originally set up the criteria for solving the problem it describes. Then instruct each team to compare the different solutions to its original problem, rating on a scale of 1 to 10 how well each team did.

Ask a member of each team to read the problem statement and solutions in increasing order of points, so that the highest-scored solution is read last. When all the teams retrieve their solution cards, the team with the highest number of points is declared the winner of the game.

There are literally hundreds of other types of warm-up exercises. The focus here was to describe those with a definite classroom objective, rather than those designed merely to introduce participants in the class to each other. (Several examples of the latter are shown in Appendix D to Section 1.) One of the best ways to learn about new warm-up exercises is by participating in other educational programs -- union and non-union. Oftentimes the warm-up exercises can be used exactly as demonstrated or can be easily modified for union education programs.

SECTION 2

SETTING COURSE OBJECTIVES AND HOW ADULTS LEARN

Setting Objectives

Setting course objectives is crucial to effective learning. It is not surprising that sales trainers -- probably exposed to as much training as anyone -- said in a survey that well conceived course objectives were the number one reason for a successful training program. Clearly expressed course objectives help each learner identify exactly what they are expected to learn.

The learning objectives for any course should state clearly and concisely what a person should be able to do upon completion of the course. There is no magic number as to how many objectives should be listed, but on average about three per class period is a good number.

Students will be coming to the class with different individual abilities, skills, and knowledge -- and consequently different individual needs. Ideally the objectives should relate to the students' needs as best the instructor can determine them. It is relatively simple to integrate responses into the course objectives if the warm-up exercises help determine these needs, perhaps by the participants individually answering the question: *"What are your objectives for this workshop?"*, or through a brainstorming process of listing their questions, concerns or challenges regarding the workshop topic.

This process can insure that the students' interests are recognized and that they have a part in shaping the agenda. One good idea is to post these objectives prominently in the classroom, refer to them throughout the program and perhaps adjust them if the need arises.

In most instances the process of determining objectives is done by the instructor prior to the session. It is discomforting to most instructors, especially new instructors, to have to adjust to the needs of the students, but with practice it can be done. It cannot be stressed too

strongly that in determining course objectives, the instructor must relate them to the differing characteristics of each individual class. For example, in a shop stewards training program, some individuals may have particular problems such as unfamiliarity with the contract or lack of prior experience in handling grievances. The course objectives need to reflect this, even if it means modifying preconceived objectives.

In Train-the-Trainer Programs the course objectives will already be established for the new trainee by the union's education director or the person in charge of the program. It is important, however, to see the setting of objectives as an on-going and interactive process. They should be modified if they are found to be deficient and unrelated to the diversity of experiences in the class. It is impossible to identify ahead of time all the anticipated learning needs of the students.

If the course objectives need to be modified, it is best done in a collaborative context with the class. This insures that the students agree on the modification of objectives and hence have a real stake and commitment to achieving them. It can be educationally disastrous to continue with "canned" objectives that miss the needs of the students completely.

Another very important reason for clearly stating objectives is that the evaluation of the program or learning activity is easier. This does not refer to whether the students liked the course or the instructor, but rather whether the course accomplished what it set out to do. Sometimes when the needs of students are determined in advance of the class, (as well as course objectives), the course can be interesting, but not effective.

Remember: an effective course is one that meets the real needs of the students and the union, not one that covers all the points the instructor thinks are important.

Three Types of Course Objectives

It may be helpful to look at course objectives from three different perspectives. The first deals with the transfer of **knowledge**. Knowledge refers to the kind of information you want the students to have at the conclusion of the course, their understanding about a subject, and their ability to solve a union problem or evaluate a difficult situation.

The second category deals not with information transfer but with **values, attitudes, beliefs and ideas**. It relates to individuals' feelings, emotions, fulfillments and relationships with others. It attempts to make people more aware of events and willing to look at things a little differently. In union situations, this may relate to how the students look at (value) their union, their leaders, their union's accomplishments and, of course, their attitude toward the company.

The third category of objectives tries to modify observable behavior. It generally relates to certain **performing skills**. One example might be in the area of computers. The objective of the course may be to teach the students how to develop a spreadsheet. While this does involve exchange of information on the topic (the first category of objectives) and may even involve overcoming a fear of "technology" (the second category), the bottom line for the course is, *"Can the students go back to their union and program a computer?"* (a physical, demonstrable activity).

In setting course objectives the instructor should look at all of these different types of objectives to insure that all "bases are covered."

Knowledge

The following are specific objectives concerning information or knowledge as it may relate to shop stewards training. One typical course objective is that upon completion of the course the student will know the Five W's - Who, What, When, Where and Why. In the processing of a grievance the student needs to know how to effectively find out this basic **information**.

Another skill that falls under this category is **problem-solving**. How do you put the pieces together after you have the facts to determine just what happened to the grievant? This relates to analyzing the reasons behind the grievance. Why did the supervisor act the way he or she did? What was the motivation?

Another example is **judgment**. How does a steward respond to alternative discipline proposals of management? When these types of results are desired, course objectives might look like these:

- At the conclusion of the course the student will be able to differentiate between a legitimate grievance and a gripe.

- The student will be able to discover the necessary facts involving a grievance; and be able to conduct a thorough investigation.

- The student will understand which section of the contract can best be cited in the defense of a grievant.

The bottom line is that all of these objectives relate to information, facts and reasoning skills on the part of the steward.

Attitudes

The second group of learning objectives has to do with students' interests, attitudes and values. These obviously relate to the "knowledge" category, but some illustrations will point out the differences between these categories.

Perhaps the steward comes into the classroom with a defeatist attitude. No one appreciates their contribution; they are by-passed systematically within the grievance process. These individuals are looking for something completely different than knowledge about how to process a grievance. These personal attitudes of students are often ignored by instructors, because they are a little tougher to handle. But unless they are handled, the instructor is not meeting their perceived needs.

How can these concerns be stated in the form of class objectives? These are possible ways:

- The student will be able to handle different reactions by the supervisor -- anger, irrationality, deception, etc.

- The student will develop good listening skills, so that they can determine from the interview with the grievant exactly what occurred in the grievance.

One other category of objectives that falls within this area deals not with relationships to the grievant or management, but has to do with individual attitudes. Perhaps the best example of this concerns the area of discrimination. Racial or sexual discrimination in the workplace may be something that the instructor wants the students to be aware of; in fact, the instructor might want to change or modify existing attitudes.

If this is the case, course objectives may state:

- Upon completion of this course, the students will become more aware of sexual/racial discrimination that occurs in the workplace.

- The student will be alerted to the way management may treat particular individuals in the area of training and promotions.

These objectives don't relate so directly to the knowledge of the contract or information on plant activities, though, of course, this is part of it. The difference is that these objectives are trying to change attitudes, values -- the way people look at a situation.

Skills

The third and final category of objectives deals with performing skills. At first impression this would not seem to apply to stewards training, but may be more related to courses involving apprentices or skill training. However, two illustrations in the area of shop stewards training will show its application.

The first deals with the ability of the steward to "argue" the case of the grievant. **Verbal skills** in this regard are sometimes a major focus of a steward's course. Think how this is usually accomplished. Two people role play a situation, one playing the part of the steward, the other that of the supervisor, and the rest of the class are "observers." If the objective is to develop good verbal skills to handle this situation, who do you think receives

these skills in the scenario above? Certainly the role players, but, what about the observers who review the role play and discuss what worked or didn't work? They were able to develop their analytical skills, but because they did not actually argue the case, they may have learned little to help them in developing verbal skills.

The second illustration deals with **writing** a grievance. A course objective could be to develop the ability to write clearly the reasons for the grievance. This, of course, entails using informational skills (included in the first group of course objectives), but obviously it is a distinctively different skill. The good steward must take the information (facts) of the case and put it in concise, orderly and intelligent language.

To review: there are three major categories of course objectives. The first deals with analytical or informational skills, the second with values or attitudes, and the third deals with performing skills. Each is different. Each may be part of the instructor's course objectives. The important point is that the instructor, in setting forth course objectives, needs to make sure he or she reviews all three options.

Characteristics of the Adult (Union) Learner

Many adult learners enter educational experiences with apprehensions about the unknown and about possible failure. They cannot reconcile their role as the student with their idea of the responsible adult. Those who have been out of the classroom for some time may feel uncomfortable with being in a class, or they may feel they are getting a little too old for classroom education. To overcome these problems, learners in the early phases of the program need to be given reassurances. Small groups are an excellent method to dissipate the fear of failure by spreading the risks out to the group rather than putting them on the individual. Simple group tasks at the beginning of the program can help move the class to more difficult assignments later.

Adult motivation to learn plays a major role in determining learning outcome. The degree and quality of their participation in learning activities depend on whether their expectations are being met by the program. If not, they may withdraw from the program, if not physically at least mentally. This can be alleviated by giving the students

the rationale for small groups and making sure the tasks or assignments given to the group are consistent with the objectives of the course. **Adults are motivated to learn when they have a need to do so.** They want to know how the training will help them immediately.

Adults learn best through activities. That is the essence of the small group technique. With continued use of this process they increase their learning and retention more than through other passive (though standard) approaches such as lectures.

Adults relate their learning to previous knowledge and experiences. Students also learn from life experiences so their learning should be based on their real-life experiences rather than on topics or subjects chosen exclusively by the instructor. This is helpful to making connections between new knowledge and background information they may already possess, but it is a hindrance if the new knowledge does not relate to what they currently know; in such situations they may dismiss or reject the new knowledge. The focus during training is on solving job-related problems rather than on gathering new information that may or may not have some relation to their work. Union learners take a practical approach to training; if you offer theory and new knowledge they will try to apply and relate the information to their backgrounds, jobs, career paths, etc.

Putting this into a shop stewards training context: even new stewards, who may not have as yet processed a grievance or even been a grievant themselves, probably have been union members for awhile and have certain familiarity with their local and national union and also with the role of the steward. They generally enjoy sharing their workplace experiences with the rest of the class.

The instructor needs to be aware of the amount and variety of experiences the students bring to the class. The instructor should respect these experiences, and relate the course material to these experiences. As learners, the students need to relate what they are learning to what they already know. After presenting important points, the instructor should give the students time to assimilate what was said with what they already know, and, how it may relate to their experiences in the plant or office. Students may then feel more comfortable in sharing their workplace experiences with the rest of the class.

Related to the above is the fact that **union learners are problem-centered**. They want to know how the material offered in the course can be applied in their own work situation. As an instructor, try and remember to: provide realistic examples and exercises; provide hands-on practice whenever possible; encourage questions; and encourage opportunities to share experiences and problems.

The students in your class, for the most part, are **attending voluntarily**. They are personally responsible for attending the sessions and in this sense are self-directed. They are attending the course to bring back tips, solutions and ideas that they can immediately incorporate into their union situation. They are looking for immediacy.

As a group, **learners vary greatly** in education, background, experience, intelligence, emotional stability and motivation for achievement. They come with some knowledge and skills related to the subject, and certainly with strong and well-developed attitudes. Instructors and trainers must allow for these differences as they plan and present the instruction. A special word needs to be given to the changing **diversity of the students** in a typical labor education program. Women and minorities -- as well as individuals with a wide variance of cultural experiences -- make up an increasing proportion of labor education classes. The instructor needs to be conscientious about the use of slang, idioms, and particularly any flippant remarks or inappropriate stories. Sensitive people who do not know the instructor personally, are often quick to form immediate impressions based on their use of language, body movements, dress, etc. The instructor may directly or indirectly turn off certain individuals in the classroom; in addition to being an impediment to effective teaching, certain behaviors can be a personal affront to the affected individuals and should not be tolerated in any classroom.

A brief word concerning language, reading and spelling. The instructor needs to be aware that there can be problems with **students who do not have English as their primary language** and also that **many workers are not very skilled in reading and writing**. These issues may not be as severe a problem in labor education classes as in the population as a whole, because of the self-selecting process. Generally students can read fairly well. The major problem arises when students have to write down items on a flip chart as part of a small group process. Again, however, someone in the small group who has some decent spelling skills often "volunteers."

The problem of non-English speaking students is a bit more complex. If someone does not understand English there is a definite concern that the course will be of limited value. Conducting the class in that person's native tongue is the only real alternative.

If someone has limited ability speaking English but has some general familiarity with the English language, the problem obviously is not as severe. What could compound the situation is heavy reliance on the lecture mode; since this is downplayed in this manual it should help alleviate the problem. In fact by its very nature, extensive use of small group sessions tends to ease the situation by mixing up individuals with limited English skills with individuals who may be bilingual. Through this arrangement students help one another. A good instructor who is alerted to this situation can help ensure that the problem will be minimized.

Many books on the subject of adult learners contain a list of important points instructors should remember in teaching adults. The Canadian Labour Congress' teaching manual for health and safety representatives lists ten general principles of learning. These are helpful tips new instructors should review prior to their classes. They are included in the Appendix to Section 2.

How To Structure a Union Education Class

The above principles that address the basic characteristics of adult learners provide a strong incentive for the course to be delivered using a "student-oriented approach" rather an instructor-centered approach. The "student-oriented approach" has certain characteristics. Among them are: less lecturing, less structured instruction, less teaching to cover a list of do's and don'ts, less "this is how it should be", more use of group discussion techniques, more adjustment in instructional content in response to student feedback, more relevance of class material to student life experiences, more concern with practical applications, and more varied instructional techniques.

The net result of this type of approach is to change the method of instruction from the traditional lecture or lecture/discussion with "control" resting in the hands of the instructor, to a process which stresses diversity of opinions, less reliance on the instructor as an expert, and a sharing of experiences to determine the best approach.

A key aspect of this instructional approach is the stress it puts on good course design, which will be discussed in Section 3. Unlike the traditional class where the instructor is viewed as the "fountain of knowledge," this approach emphasizes good program design that meets the needs of the students. Quoting from an article "Ten Myths about Instructor Training" by Martin M. Broadwell in the May 1990 issue of Training Magazine: *"A good instructor cannot overcome a bad design, but a good design can overcome a poor instructor."* A question one would immediately ask is: *"What's a good design?"* The answer is: *"One that has the students doing their own work to achieve the objectives."* If the students need to be able to explain something in a contract while on the job, the design will have them working with the contract in class. If they need specific approaches or actions in handling management, the design will make all of this happen in the classroom.

Note the distinction. The design will make it happen, not the instructor. All the instructor has to do is give out the instructions, get out of the way and let the design accomplish the learning. We know that it is a good design when the students go back to the job and say, *"I really learned a lot. I don't remember the instructor's name because I had to do it all myself."* This may be a bit of an exaggeration, but it stresses the point that the objective is not for the instructor to receive the accolades, but for the students to learn how to do the tasks themselves.

SECTION 3

INSTRUCTIONAL TECHNIQUES AND THE EFFECTIVE USE OF QUESTIONS

Teaching Techniques

Keeping in mind the discussion on how adults learn and the importance of setting clear course objectives, the next and most important step is to present the course material in an effective way.

This handbook will concentrate on student-oriented types of instruction, as contrasted with instructor-oriented approaches. Examples of the latter are lectures, lecturettes (mini-lectures), and to some extent, discussion methods, especially those controlled by the instructor. These techniques have a place in any education program, but they will be relegated to a secondary role while emphasis will be placed on the more active types of teaching techniques.

Specifically the following techniques will be stressed in this section: **Small group discussion** methods (sometimes referred to as buzz groups) and the use of **questionnaires** (oftentimes used with small groups although, of course, they can also stand alone). Questionnaires can be quite structured and formal in nature or can simply involve one or two open-ended questions thrown out to the class.

Other valuable teaching methods to be examined are: the use of **case studies** and **role playing**. Role play, by definition, is a technique involving students, though structured and sometimes directed by an instructor. Case studies can challenge the student to solve real workplace situations. Both techniques need a scenario or script. The closer they approximate the problems students face on their job, the better.

Finally, the technique of **brainstorming** will be described. It is a process by which every individual in the class is asked to contribute ideas or suggestions on a question or problem. What could be more student-directed than that?

The emphasis on student-oriented teaching methods is modeled after techniques developed and utilized in labor education programs in Great Britain. The British equivalent of the AFL-CIO, the Trades Union Congress (TUC), has incorporated these concepts in all of its educational programs.

In their methods course on trade union education, they outline a basic pattern for any session. It begins with an introduction, links the session topic to the experiences of the group, and sets up the objectives or aims of the program. They next develop a set of tasks or activities (suggested number: two to four per day) for the students that will help them achieve the course objectives. The outcomes of these activities are then reviewed and summarized. (A more detailed explanation of the Trades Union Congress' approach is contained in Appendix A to Section 3.)

This is essentially the format that will be stressed here. Heavy emphasis will be put on using student-oriented instructional techniques as the vehicles to accomplish the intended outcomes of the course.

In summary, the British approach to labor education stresses that the best way workers learn is through looking at their own experiences, sharing and refining them with other students and then developing some ideas on how to apply this exchange of information. The point is not merely to exchange ideas (though that is an important and essential element in the process), but to use this information to assist in the solution of workplace problems. Their approach involves extensive use of small groups; the value of small groups is to help the students determine the best approach or solution to the problem. To illustrate: The students may have had particular experiences with potentially toxic chemicals and may differ on how to handle the situation; through small group discussions they can assess these alternative solutions and determine the "best" way to handle the problem. The students, through the educational processes developed by the instructor, arrive at a solution or understanding of a problem; the instructor has not given the "correct answer" to the problem, but has designed a teaching technique to help the students resolve the situation themselves.

The Small Group Discussion Method

Small groups[2] are central to all types of participative learning. They can be used in a multitude of ways: to respond to open-ended questions, to provide a variation to the normal brainstorming process, to analyze case studies, to collectively fill out a questionnaire and even to simultaneously enact role playing scenes.

An obvious but important difference between small groups and traditional classroom instruction is the physical arrangement of the class. When chairs and tables are arranged facing an instructor in front of the class, the students can't relate to each other; but when the students form a circle (a typical small group arrangement), all are invited to engage in the sharing of ideas.

Small group work is one of the most valuable instructional methods used in trade union education. To make it work, the instructor needs to appreciate its value, understand how to set it up, and how to manage it.

1. What is the value of using small groups?

a. Small group work is active and participative.

Everybody in small groups should be actively participating, but this is not always the case. It is, therefore, important for the instructor to discuss the role of the participants in the group -- emphasizing that the success of the task will be ensured by everybody taking the task seriously. Even in a small group it is still possible for the talkative participants to dominate. Emphasize the duties of the "chairperson" and "reporter." These duties should

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[2] For the purpose of this handbook, the term "small group" will also encompass buzz groups. The latter has similar characteristics, though generally smaller in size and with a more narrow focus.

be rotated to encourage all participants to develop skills in handling a discussion, taking notes and presenting a report.

b. Small group work encourages cooperation in working together.

Small groups involve a teaching style that emphasizes cooperative efforts among students and with the instructor. It stresses the importance of common inquiry into learning and is rooted in the belief that knowledge is inherently social in nature.

c. Small group work allows doubts to be expressed and helps remove inhibitions.

Small groups provide a way for trade union participants (students) to "think aloud" or test out ideas, something which may be difficult to do in a full group. If this habit is encouraged, the participants are more likely to develop creative thinking skills. The testing out of other (alternative) ideas or proposals in the safety of the small group helps build confidence in participants.

d. Small group work draws on the skills, experience and knowledge of all participants.

It can be used regardless of a variety of learning experiences. In fact, a mix of different levels of experience within the union can be very beneficial. Sometimes a union novice has a different perspective no one has thought about before. There is a caution, however, for the instructor and that is not to let the principal officer(s) dominate the small group discussions. If that can be anticipated, then alternatives such as using them as "roving" group leaders (listeners) may be an option.

e. Small group work reinforces the process of trade union education.

Trade union students are able to compare their experiences thoroughly in small groups, and efficiently report back to the main group -- which will be a "pooling" of these experiences. In the end, participants will analyze their real life situations and consider any improvements that may emerge from the discussion (this will happen with issues such as handling disputes). The instructor can then concentrate on bringing out the implications of the action in the steps suggested.

2. What size should a small group be?

For a small group to work effectively the maximum number should be 5-6 people. This may mean having many groups (up to 10 in a class of 48 participants). The main function of the small group is to tackle a learning activity in an efficient manner. Keeping the size of the group to the suggested number helps achieve this. Another suggestion when setting up the groups: try for as much diversity as possible -- at the minimum break up normal cliques. Try to make sure there is a variety of experiences represented to encourage learning.

3. How are small groups managed in the class room?

The following practical points may be helpful in making small groups successful:

a. Setting the task:

- make up a task that fits the aims of the course;
- make sure the task can be managed;

- put the task in writing so that everyone is clear as to its meaning and so that participants can refer to it during the small group exercise;

- make sure the participants understand their role in the group (particularly the chairperson and secretary or reporter).

b. Supervising the groups:

- allow the groups time to sort themselves out before starting with any supervision;

- check each group to see whether the directions and objectives are clear;

- check to see how far each group has gotten on the task and how much more time each feels it needs to complete the task. Then announce a compromise time to the entire group *"you have three more minutes"*;

- change the groups for each discussion or as issues under discussion demand. On some occasions you may need to have experienced people rotating among the groups or mix abilities for specialized projects.

c. Taking reports back from groups:

- keep objectives of the course in mind;

- ask the participants to give examples of the points under discussion;

- write down important facts and conclusions;

- analyze the implications through discussion;

- summarize and reinforce key points; and

- point out the implications of actions suggested.

Group tasks at the beginning of a program may not run as smoothly as you would like. The need for inclusion and security are priority concerns for individuals new to the learning environment. Learners' behavior in the early stages of the program may be inwardly or self-directed. To help overcome these problems it is important to include good warm-ups or icebreakers so that learners become acquainted with one another and become comfortable with small group activities.

Use of Questionnaires

A questionnaire is a teaching technique that can be used in small groups or can stand alone. The normal or traditional impression most students have of questionnaires is a series of questions on a particular topic that have to be answered (which is really a "test"). Even though the student may be reassured by the instructor that *"this is not a test"* and that the questionnaire *"will not be collected"* some students tend to be intimidated by this technique. People may become discouraged if they cannot answer at least some of the questions. Just as in a school setting, the student may see others having no problem with the assignment and become discouraged with the process. Of course the questions could be made extremely easy, but this is a self-defeating educational outcome.

Most of these problems can be easily eliminated by redesigning the traditional questionnaire. Two such examples of "Non-Traditional" questionnaires appear in Appendix B to Section 3. Neither of these is threatening or intimidating, nor could they be mistaken for a test -- basically because they do not look like "normal" questionnaires.

In typical shop stewards training, students are given a list of situations facing a steward and are asked how they would resolve them; or the students are given five different "roles of the steward" and are asked to select the one that is the best; or they are given a series of work

situations and asked to determine whether it is a grievance or a complaint. These are all variations of a questionnaire, but are "disguised;" they also force the student to think about real life situations they may encounter.

In fact, the questionnaire that asks for specific answers is a poor education technique. Such questions as: *How much do women earn as a percentage of men's earnings?; Is a sales tax better than an income tax?; What does the term vesting mean?; What is the importance of Section 8(a) in the National Labor Relations Act (NLRA)?* are of limited value. Yet they are very good tools for an instructor interested in achieving his or her own objectives. All that is needed is to develop a series of questions, hand them out, ask the student to answer them, see what answers they arrive at, give them the correct answer, and move on through the entire questionnaire. If done correctly this can take up a good portion of the class time, but little learning takes place. The students have answers to maybe ten questions, with a little extra elaboration thrown in. Under the best of circumstances a minimum of information is exchanged outside of the questions on the sheet. In a sense the teachers are teaching "to the test," a practice frowned upon in good instructional circles.

A better approach is to pose a series of open-ended questions. Examples are again available from the One-on-One Program, since its training material was specifically developed to "guarantee" responses.

Examples of open-ended questions in the One-on-One Program include:

- *Can you think of one or two objectives or goals you would like your union to achieve?*

- *How does your local inform members about union or workplace issues?*

- *Who or what has prevented unions from achieving their bargaining goals?*

These and similar questions are sure-fire generators of discussion, since they lead easily into contrasting viewpoints, attempts to "prioritize" the responses, and to selection by the class of the best response.

Another variation is to develop a list of possible solutions to a problem and have the students individually and/or collectively rank which is most important. For example, the class could be asked to list the qualities of a good instructor and to rank the most important; similarly the class could list the benefits of joining the union. The various survival exercises mentioned in Section One are a variation of this technique. These are excellent warm-ups or icebreakers, because they usually generate lively discussions and everyone can be an "expert."

Surveys - A Form of a Questionnaire

In the One-on-One Program, stress is given to the development of surveys. Obviously this is a questionnaire, though not called that. Students may be asked to develop the five questions they would ask non-members as to why they haven't joined the union; or members are asked what they would like in improved fringe benefits; or members are asked their opinion of the drug testing policy of the company, etc. All of these are examples of questionnaires which supply useful information, and more importantly, can become the foundation for setting local policies or for developing an educational program to address the problem.

One word of caution regarding surveys (and this applies in general to all questionnaires), try to achieve some balance between obvious answers and answers that are beyond the scope of most of the class members. You don't want to insult the students' intelligence and little is gained from asking questions with simple answers, or from asking students something they already know. Some instructors feel that this approach gives students a sense of accomplishment, but essentially these types of questions should be avoided.

The best of both techniques is utilized when the survey/questionnaire is combined with the small group process. Most of the tensions associated with the questionnaire can be alleviated by a collective response through the use of small groups. No one individual is responsible to answer the questions correctly, the group does it. The group can discuss options, the group can provide an opportunity for arguments pro and con, the group can collectively see the merits of alternative answers, and the group can decide on the "right" answer. The risks associated with individual decision-making are now shifted to the group. No one outside the group (including the instructor), knows how the process worked or how the final decision was reached -- in fact that's not important. A collective result was obtained.

Case Studies

The life of a local union officer or steward is a series of problems, usually requiring rapid decisions. In solving these problems, the union leader often is called upon to collect or identify certain facts, and then is required to exercise judgment weighing all the information carefully. The case method is a good vehicle to develop these traits. Case studies describe events and situations from which decisions are to be made. The object of a case study is to present to the class some detailed information about a situation that upon examination yields a conclusion applicable to a general category of events.

The advantage of the case method is that it requires the class to consider a problem much as an individual would have to do in real life situations, and to use facts and judgments to solve the problem. All segments of the class have a common basis for discussion.

Almost any type of union situation -- meetings, grievances, negotiations -- can be developed into a case study. In the development of cases for use in the classroom, the important educational element is: How does this case relate to the objectives of the session or the course?

Sometimes a case is used (as in the case of questionnaires) to fill up a major chunk of the class time, with little regard to course objectives. A good (or bad) case will consume time, but will it accomplish the objective of the instructor? This is the question that justifies its use.

The steps in the process are:

1. Introduce the case carefully giving participants clear instructions;

2. Give participants an opportunity to report to the entire group on their deliberations; and

3. Always finish with a summary decision in which the points of main relevance are emphasized.

The qualities that make for a good case study are very obvious to anyone whether or not they are involved in labor or adult education. It, first of all, must be relevant, but it also must be interesting. It must portray a real or possibly real situation. It must contain enough specifics and details for the student to handle the case in several different ways. It must be easy for the students to put themselves into the shoes of the individuals in the case, so that they can see the options available. Finally, it should force the class to talk about common problems and seek realistic solutions.

While developing a case study is relatively simple, its use as a teaching technique can be quite complex. Too often the case is presented to the class (and here it's presumed to have all the qualities mentioned above) and individuals or group leaders are told to report how they would solve the problem. Then everyone involved gives his/her opinion, and the instructor moves on to the next part of the program. This is poor teaching. The instructor needs to relate the case to sound educational principles. *What is the purpose of using this case? What is the intent? Is it to undercover all the facts in a situation? Is it to determine if this is a legitimate grievance?*

Is it to look at management's argument in the case, and determine the best response to anticipated challenges?

If the class interprets the case differently from your intended objective, that is not necessarily bad; it may just mean that the case didn't do what the instructor anticipated. The instructor may be forced to use an alternative device to accomplish the course objectives.

Role Playing

When case studies are dramatized by individuals, (including the instructor in the class) they become role plays. Every role play needs a scenario. There has to be a scene, a situation, and event, a story -- a case study.

Role playing is the on-the-spot acting out of a situation or incident. When used effectively it can illustrate different ways of handling particular problems, it can show how to handle opposition arguments, it may sensitize the group to a particular issue or approach, it can be realistic, and it can be entertaining. When used ineffectively it can become unrealistic (actors hamming up the case or alternatively not fully exploring the potential of the case), it can be threatening to the actors, it may be atypical to the majority of the class, and it can be a bore.

It may look easy to set up a role play, but it is not a simple education technique; it usually takes considerable practice and experience to make it effective. For this reason and because some students may be uncomfortable with it, it may be better to use some of the other participative techniques, before embarking on role playing situations.

Many books and articles have been written on role playing. A lot of do's and don'ts have been set forth. Most look at the process, few at the psychology involved. When an instructor says the magic words, *"I'd like some volunteers for a role play,"* the reaction is usually panic in the eyes of the students for fear no one will volunteer and

that they will be called upon. Though this apprehension may result from some previous personal experience, in most cases it rests with the fear of looking foolish before the group. Instructors sometimes compound the situation by not understanding this fear and forcing individuals to go in front of the class with little preparation, and then wonder why the role play is not successful.

The Types of Role Play Methods [3]

The two main types of role play methods are the structured and the spontaneous approaches. Each method has its place in the arsenal of the union's education system.

Structured Role Plays

The structured approach involves a role play scenario the educator has written in advance that is intended to focus on a specific skill or problem. The structured role play can have a script that rivals Shakespeare or it can be so flexible that the role players ad lib from their experience. The low- to medium-structured role plays are the most appropriate for union skill development. A typical example focuses on the skills of presenting the grievance at the informal step. In this approach, the stewards are given a short sketch of the characters and the nature of the incident and they then bring in their own experience to plug in the gaps. The role play could either call on the steward to interview the grievant, or ask the steward along with the grievant to confront the supervisor or foreman. All of the participants in the role play need to be given a separate description of their roles. It is crucial that the scenario be written in the language and in the context of the steward's group so that they can plug in their own situation. The structured system is most appropriate for basic stewards and staff training.

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[3] This section abstracted from a paper written by Walter Pearson, the Director of Education for the Bakery, Confectionery and Tobacco Workers Union.

Spontaneous Role Plays

The spontaneous approach is generally used with advanced stewards and staff training and involves a much higher level of skill. It also requires of the instructor a higher level of knowledge of the problem areas and skills the group is likely to be confronting. In this kind of approach, the group is asked to explore through discussion the kinds of problems they are having in a particular area.

One example might be in internal organizing. The instructor would open with some questions for the group that help the group to focus its thinking on the kinds of difficult arguments one confronts when trying to persuade a non-member to join. When the discussion produces a set of difficulties, the instructor then focuses on one specific argument and checks with the entire group to make sure that this "problem argument" is shared by the group, rather than just one person. The person who raised this problem is then asked to role play with another individual the exact situation which gave them difficulty.

The instructor stops the role play after the situation has been developed sufficiently and engages the group in thinking through solutions to the problem. He or she is not to give the solution, but to raise the proper kinds of questions to provoke and focus discussion. The ideas for solutions are "flip charted." After the group reaches a consensus, the original role players are then asked to switch roles and re-enact the role play, using the solutions the group has developed. The original problem-raiser is then asked to share his/her feelings about how the new approach worked and the other role player is asked for judgments about the arguments or behavior used. The solutions are then evaluated by the group into a set of priority solutions (arguments and behaviors). The entire group could, at that point, be asked to enact the same scene in multiple role plays. The advantages of multiple role plays are that individuals are not "exposed" before the class, but still get the benefit of acting out the

scene. It can also detect variations in the scenario that may not be possible with only a single role play incident.

The Role of the Observer in Role Playing

The role of the observer in role playing needs to be given particular attention by the instructor. Too often the instructor gives only general instructions to the observer such as, *"Pay close attention to the scene because I'll ask you to comment on it after it is over."*

Instead, what is much more helpful is to give specific instructions on what is expected of the observer. Written instructions should list the specific things the observer is expected to watch for.

In the process, a good idea is to first differentiate the personal attributes of the players such as: *Were they persuasive? Did they take the initiative? Did they state their case clearly? Did they rebut arguments effectively? etc.* Secondly, the observer can focus on the logic of the argument or discussion. *What were the main aspects of the case and how did the role player use them? What other arguments could or should have been raised?*

Good observers can help the instructor immensely by highlighting the good and bad aspects of the role play. In fact, it often is more effective to receive constructive criticism from one's peers than from an instructor who may be viewed as an expert in the matter. The value of the role play can be strengthened if the class clearly understands the difference between the role play and the ideal way of handling the situation. Ideally, the instructor wants to instruct the class via the role play on the proper or best way to handle a case. Good, constructive comments by the observers can go along in ensuring that this takes place.

The Doubling Technique

This is a technique used in the demonstration phase where one of the purposes of the role play is to understand underlying motivations and feelings -- such as in a grievance presentation. To use this technique, one would assign an additional person to sit at the side of the supervisor, the steward, and/or the member. This person would remain silent during the enactment but would be told to concentrate on the unspoken thoughts and feelings of his/her character. At crucial points, the instructor would interrupt the role play and call upon the double of, for example, the supervisor, to say what the supervisor is thinking and feeling but not saying at this point. The double might say (in a presentation of a grievance), *"Boy, if they only understood how the administrator has been on me about absenteeism in this department."* or *"This is just a bunch of hogwash, the steward knows this guy is a loser. I have never understood why the union comes in here and fights for these kinds of folks."* The instructor needs to design careful questions that probe for these key, illustrative thoughts and emotions. The demonstration players and doublers should be experienced. The instructor needs to exercise care in orienting the participants about the role of the double in a technique that can be confusing, but is a powerful tool for getting at the underlying and unspoken motivations.

Role Playing - Tips for Instructors

In most cases, trainers will not be asked to develop a role play scenario from scratch, but they can consider the option of having the students prepare their own cases. This is not as difficult as it sounds and reinforces student participation in the class. Simply have each participant write up a short narrative of a real situation that fits the topic; then use the Five W's: who, what, when, where and why to plug in the details.

Regardless of how the scenario is developed, the trainers need to understand how to present the role play in the classroom. This involves: 1) explaining the aims of

the role play; 2) explaining the format of the role play; 3) setting the tone in the classroom; 4) making sure all understand their roles -- both the actors and the rest of the class as observers. (The handling of the observer role is crucial in making it a valuable educational experience - research has shown an unquestionable educational value to role playing for the actors, but the instructor must make sure the observers understand their roles or they will be truly just "observers"); and, 5) relating the role playing to the objectives of the course.

The educational value of role playing can easily be lost. The instructor must be extremely alert, so that in his or her critique of the role playing all the nuances of the scene are picked up. Likewise, since the instructor has relatively little control over what might actually transpire in the role play, he or she must ensure that if the course objectives are not evident in the role play, then they must either do it again or accomplish the objectives via another educational technique.

The entire process can then be summarized and concluded.

Brainstorming

The last teaching technique to be presented is brainstorming. This is a process of throwing out a question to the entire class and asking each individual to come up with the first response that pops into their head. Its goals are to generate an extensive number of ideas or solutions to a problem by suspending criticisms and evaluation, and then to use the ideas generated to develop skills in creative problem-solving.

The idea is to put judgment and evaluation temporarily aside and turn the student's imagination loose. After the instructor has collected all of the ideas from the class and recorded them on a flip chart or a blackboard, some checklist like this should be followed:

1. Ask again if anyone has anything else to add.

2. Check if any of the items need clarification (or improvement).

3. Do any of the items overlap or can one item be substituted for another? If so, combine or adapt them to eliminate any duplication.

4. Consider putting the items in some type of priority order such as asking each person in the class to rank the top three items.

While the process is simple and often entertaining, very little space in the literature is devoted to how to formulate a good brainstorming question. This is the crucial element in the entire process. (It also relates to a later part of this section: how to ask good class discussion questions.)

The question must obviously be one with unlimited possible answers. It should also allow for distinct individual responses. One illustration of this technique is to ask the class to describe their own city or state (or union or company). For example: *What word or two would best describe New York City?*

A more relevant question for union members might be: *How would you attract young members to participate in union activities?* or, *How could your union raise some money?* The possibilities are restricted only by one's imagination.

Non-Traditional Educational Techniques

The above are a few of the more popular educational techniques that can be used to generate participation from the students. They are the more traditional student-oriented techniques. But there are many other techniques that cannot be easily categorized -- because they fall outside the norm. When an instructor is given an assignment to develop a course or class objective and accomplish it through a student task or activity, even neophyte teachers can come up with some extremely innovative approaches.

To illustrate this, the following are some actual techniques developed by students in the Basic Teaching Techniques classes offered by the AFL-CIO Educational Department and the George Meany Center for Labor Studies:

☆ To demonstrate the impact of federal programs, have the students open their wallets or purses and describe the various items they carry such as credit cards, social security cards, drivers' licenses, etc., and relate any of these to government programs that may affect them.

☆ To show the importance of collective action, divide the class into small groups and have them answer the following questions: 1. What is labor solidarity?; 2. Think of two ways to show labor solidarity; 3. Give one example of the success of labor solidarity involving more than one union.

☆ To demonstrate the different types of speeches and their complexity, have the students pick from an envelope various topics and have them extemporaneously give a two-minute talk. Topics like *"my favorite vacation"* are relatively easy, but *"my most embarrassing moment"* or *"why I like the color pink"* may provide more of a challenge. Course objective: illustrate the differences between speeches involving familiar and comfortable topics and those that are unfamiliar and uncomfortable.

☆ To analyze a complex labor law, have the students look at several clauses of the law and determine what, if anything, is wrong with it (from the union's perspective). After each group makes its presentation the class has a better idea of the faults and shortcomings of the particular piece of legislation.

☆ To point out the differences between mandatory and permissive subjects of collective bargaining, select out various topics of the contract and ask small groups to determine into which category they fall.

While some of these illustrations piggyback techniques described earlier in this section, others do not fall into any of the categories. It is important not to restrict oneself by using only the four or five teaching techniques described earlier. Good student-oriented techniques are only limited by your imagination and individual creativity. The important point is to make sure that the objective of the session is met. Again, the approach is to devise a student-oriented technique that has the students, rather than the instructor, reach the intended educational objective.

Effective Use of Questions: Its Role in the Participative Process

An important adjunct to instructional techniques is how an instructor can effectively use questions to complement class discussion or class output.[4] New instructors need to develop skills in asking questions to accomplish course objectives. However, it generally takes considerable practice to use questions effectively. A good questioner can use this skill to solicit opinions, attitudes and ideas and to provide an opportunity to seek alternate solutions to the problem or solicit opposite points of view. Good questions will draw out non-participants, contribute to everyone's understanding, and even redirect discussions gone astray. But the worst approach is to ask such questions as: *"Does anyone have any additional questions?"* or,*"Are all these points clear" or, "Is everyone up to speed?"* In most instances participants are caught in a dilemma. To answer these questions one has to admit that they are not able to follow the instructor. They may think: Is everyone as confused as I? Maybe if I listen more carefully I'll catch up. The other side of the coin is the impression that the instructor is ready to move on and really doesn't want to entertain any questions.

Most of the tasks and exercises used in student-oriented approaches in labor education require a list of responses from the class or

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[4] The AFL-CIO Education Department uses, as a supplement to this section on questions, an excellent video entitled "Trainers on Track" produced by VIDATRON Learning Systems of Vancouver, Canada. The video gives facilitators tips on asking the kinds of questions that will lead people to their own conclusions. The video also shows how best to create a good learning environment.

small groups. What the instructor does with this output is crucial to an effective learning experience.

Essentially the instructor needs to perform two important functions once responses have been elicited from the class.

The **first** is to assess the information and evaluate the responses to determine serious shortcomings, if any; the **second** is to draw out any implications, summarize the task and conclude the exercise.

To help illustrate the first point, suppose the class is divided into small groups to come up with the major obstacles to union growth and has collectively come up with the following list: NLRB, obstinate managers, the Supreme Court, the Republican Administration, member apathy, bad public relations, a poor economy and high unemployment. Looking over the list the instructor needs to make a judgment: Is this list adequate or are there some glaring omissions? Suppose in this case that the instructor feels that at the minimum, two other points need to be added to the list: union busters and the increased use of strikebreakers. What is the instructors next step?

Even before answering that important question, a few points need to be stressed. If the list is deemed adequate and contains a sufficient number of good responses, then the instructor should move on. Normally, the instructor should not substitute his or her judgment for that of the class. If with additional prodding the class fails to add to the list as the instructor would like, then proceed. Either the class does not view these points as important or is ignorant of their impact.

If faced with an inadequate list of responses to an instructor's question, several techniques can reopen the process and come up with a "complete" list.

1. Just **reopen the process** by asking the class: *"Let's spend a little more time analyzing this situation"* or, *"Let's see what other responses we can come up with."*

2. **Clarify one of the suggested responses.** After receiving the response "the NLRB", the instructor might ask: *"How does this answer relate to the question?"* or, *"What do you mean by this term?"* (this may lead to adding union busters or use of strikebreakers to the list). Or you may

ask: *"Can you give me a specific labor case involving the Supreme Court?"* or, *"How does the NLRB differ now from in the past?"*

3 **Probe.** *"Would you like to explore that point a little more?" "Could you tell us a little more about that point?"* While in most instances the tendency is to expand the point, probing can be used to narrow the point. For example, you can note that the NLRB response covers so much territory and ask: *"Can you narrow that down and give us a specific illustration of their rulings?"*

The above give some suggestions on how to handle a deficient class response. Selection and use depend on the individual instructor. Each individual instructor has his or her own style of using questions. Do you direct or redirect a question directly to a particular person in the class? Some instructors have an excellent technique in calling directly on Joe or Mary for a response, other instructors are reluctant to question someone directly. The best guideline is for the instructor to use what he or she is comfortable with; it also should be judged as to effective results.

As to the instructor's second function, the effective use of questions is again required to conclude the session or exercise. The instructor needs to get agreement from the class that the final list is sufficient and provides enough information to draw a conclusion. It is sometimes very helpful to put the list in some sort of priority. Before asking for a show of hands or a vote by individual classroom participants, make sure that you have consolidated like items and that all remaining items are clearly identified in the minds of the class. Simply ask if any items should be combined or is there a need to clarify. Offer an opportunity for individuals to disagree with the priorities, but let the majority rule.

Use questions to evaluate the session and summarize the process. *"When you add this all up what conclusions can you draw?" "Is this conclusion consistent with your experience?" "How would you summarize what we found?" "What's the bottom line of all this discussion?"* The instructor needs to insure that the class understands that the purpose is to reach a logical conclusion, and is not merely to list all possible alternatives.

An excellent self evaluative tool for the instructor is to ask himself or herself this question: Is the conclusion the class reached consistent with the objectives of this session? Did they come up with adequate responses to the question? If the instructor can answer **YES** to both of these questions then the exercise was an effective one.

Throughout this entire process of asking effective questions, a few overall communication pointers need to be kept in mind. Two specifically involve the use of open-ended questions and how to react to loaded questions. One technique that new instructors need to develop is how to form and use open-ended questions, in contrast to close-ended questions.

Some general points to remember about the differences between open and close-ended questions:

> A **close-ended question** seeks a specific and definite answer. In its simplest form it seeks a yes or no response. Has anyone run into this situation before? Does your union have trouble getting volunteers? A close-ended question is often preceded by the words *"has anyone"* or *"have any of you."* Other words to watch out for are *"would, could or should."* Could or would your union like to set up a Blood Bank?
>
> **Open-ended questions**, in contrast, cannot be answered with a yes or no response, but need an explanation. For example: Can you think of ways of improving safety measures in your plant? What would be a good way for unions to increase their political power? What has been your local's experience with the Blood Bank? How would your local react if you would propose that it establish a blood bank? The key introductory words are *"how"* and *"what"*, in contrast to *"is"* (your local willing) or *"do"* (you think it would be nice to).

With some practice and attention to the way questions are framed, the trainer can become skilled at using open-ended questions. It is consistent with the approach of letting the students respond from their experiences, rather than have the instructor give the class the correct answer. Students tend to learn better if they are forced to answer the question (either directly or indirectly in their own mind). It is much

more passive to sit back and wait for the instructor to provide the answers, than to be intellectually involved in the discussion.

Sometimes in an effort to make sure of getting the correct response to a question, a new instructor will not only use a close-ended question, but compound the problem by using it as a leading question: *"When you go on strike what can the employer do to you?"* That may insure that the instructor gets to add -- the use of strikebreakers -- to the class list, but it misuses the educational value of questions. The purpose of questions is not to satisfy a preconceived notion of what the instructor thinks is important but to encourage the students to come up with their own answers.

The other half of the equation is to be a good listener and encourage responses. How the instructor responds to questions is extremely important. Even when good open-ended questions are used, if the instructor's mannerisms and responses turn off the class, the effectiveness of the question may be lost. Oftentimes poor responses from the class indicate that either the original question was not properly worded or explained sufficiently; or it may indicate that the instructor was not listening when the class reported its ideas.

Listen carefully. Because we can listen at a rate of 400 to 600 words per minute but can speak only at fewer than 200 words per minute, our minds tend to wander when someone is explaining a point. Special effort is needed. If you don't understand the response or question, try to rephrase it, ask the person to clarify it or redirect it to another person for clarification. You can't answer a question "correctly" if you misunderstand it in the first place.

Encourage questions. Look the person asking the question in the eye. Indicate with your body language that you're interested in what they have to say.

Be flexible. If the question requires the instructor to go over the same material again, do so. If it requires the instructor to alter or modify a portion of the program, do so. (A caution: if the questions and comments are deemed unimportant to the topic or do not reflect, in your opinion, the position of the majority in the classroom, try to handle the question on an individual basis later in the session or perhaps even privately. This is another quality that can only be refined with practice.)

Turning to another point, new instructors must be alerted to **loaded questions**. In its simplest form these questions begin with: *"Don't you feel or think that . . . ."* or *"What would you do in a situation our local faces . . . ."* In its more complex form, the question may provoke a student -- in a session on handling grievances, for example -- to say *"Our local operates somewhat differently from the other locals. . . ."* Or if you are trying to illustrate how to set up a blood bank someone may ask: *"You're really asking us to do some extra work that we just cannot afford at this time."* In these cases the participants are not questioning the content of the issue being discussed, but the general assumptions inherent in any presentation.

Other examples of responses you may be familiar with: *"Our leadership just won't go along with this"*; *"Our local tried a very similar project some years ago, and it didn't work"*; *"This may be applicable in the public sector but it doesn't work in construction."* All of these sidetrack a class discussion and can throw the class into disarray.

How do you respond to these loaded statements? The instructor must first make a decision: is this a situation that might be important to other members of the class, or is it something that might affect the instructor's attempts to engage the class in a meaningful discussion? In either case, it must be addressed directly, by saying something like: *"While this does not directly relate to the issue we were discussing, let's talk about it for a few minutes."* You have now adjusted to the question by leaving the original topic, and have made the class focus on the new issue.

Another example from the AFL-CIO Department of Education's One-on-One Program: after covering the eight steps necessary to implement the program, students sometimes have skeptical looks. While no one may directly ask a question, people are obviously doubtful that this program could work in their locals. This issue was resolved by adding a new section to the course, a "problem clinic" -- whereby the students are asked to come up with the types of questions they could anticipate receiving from their executive board when they ask for approval of the program. The class is then divided into small groups to provide appropriate answers to these questions.

On the other hand, if the loaded question is not deemed to be significant, then the instructor must identify it as outside the purview

of the session or the course and move on. (How to make this decision improves with practice.)

Loaded questions or rhetorical questions are sometimes used by the instructor. Everyone is familiar with these types of responses to a question: *"You may have a point, but the position of the AFL-CIO on this issue is . . . ."* or, *"That's a very good point to raise, but I believe that . . . ."* Each of these examples lowers the opinion of the student and elevates the instructor's opinion to a priority position. A better technique would be to follow up with a clarifying question to the student, perhaps presenting an alternative position. *"That's a good point, maybe you could elaborate"* or *"How does your point relate to the situation of this other local (national union) which has a different situation?"*

Or, the question can be thrown out to the rest of the class either directly or indirectly. Perhaps the instructor knows someone who has a contrary opinion and may call on that person directly, or the question can be bounced off the entire class for clarification, support or alternative positions.

In summary, questions are a trainer's most powerful tool. They are a great way to find out if the objectives of the course are being understood and implemented. Students should be encouraged to ask questions if they don't understand something, and the instructor can throw out open-ended questions to see if the students are on the "same page."

Here's a good quote from an American Society for Training and Development (ASTD) training manual: *"People can avoid thinking during a lecture or a speech, but they can't avoid it when they are questioned. They may not answer, but they are forced to think. And when they think, they are bound to learn."*

SECTION 4

TEACHING AIDS, CLASS CONTROL, AND TEAM TEACHING

Basic Visual Aids

The effective use of visual aids is important in any teaching exercise. While there are a host of different types of visual aids, in many instances labor education programs are conducted in union halls where only a basic blackboard or a flip chart is available. There also may be a VCR and a television monitor.

Before describing the use of these techniques, it is important to first consider how visual aids contribute to effective learning. There are two basic principles involved. First, whenever the instructor can supplement a presentation with a visual aid, the ability of the student to understand or learn the subject increases substantially. While the exact percentages may be debatable -- using a visual aid to supplement a talk increases the retention substantially -- from the 20 to 30% to 50%! Secondly, some people are visually oriented and hence learn better through the use of visual aids (in contrast to other individuals who can learn better and can absorb information easily by just hearing it). To insure that the visually adaptable individuals are accommodated, the instructor should, wherever possible, write down the information either on a blackboard or on a flip chart. This technique is best used for: list building, emphasizing special words or phrases, and summarizing.

The use of either the **flip chart** or **blackboard** requires some common sense. First, make sure the students can clearly and easily read what you write down. In most cases printing is better than writing. Always try to insure that everyone in the class can see the material (especially important in larger classes or where physical impediments exist). Write down only key points and don't clutter up the board or chart; it's a good idea to number the points as you go along.

When contrasting two points use one-half of the board or chart to list each of the different items, so that the students will be able to see opposing or contrasting ideas (if you have the luxury of two flip charts, each could list the contrasting viewpoint). Sometimes this technique

can be used where the instructor has prepared some key ideas ahead of time and wants to compare these with student responses. Flip charts can also be prepared ahead of time to insure that the major points in the session are covered. In these instances, you can use two flip charts -- one with the prepared pages, the other with spontaneous responses. Another advantage of the flip chart over the blackboard is that the individual sheets of the flip chart can be posted on the wall to be referred to by the instructor. Good instructors will therefore always pack some masking tape to post flip charts prominently in the classroom. Once the blackboard is filled up, it has to be erased and the visual value of what was recorded is lost.

The flip chart or the blackboard can be used by the instructor particularly in brainstorming situations or when students are responding to open-ended questions. Also, it is a good idea to write down the pertinent points that evolve from any group discussion. When posing an open-ended question, a good tip is to write it down so there is no confusion in the minds of the students as to what the assignment is.

In some cases the instructor needs to paraphrase the student's point before writing it down. Make sure that the rephrasing is agreeable to the student -- otherwise it may limit future responses from both the individual and the class as a whole. If some of the responses are similar or tend to duplicate what is already posted, note this point but don't list the item again.

Using these visual aids to facilitate and support the learning process benefits both the instructor and the students by making any presentation more engaging and visual. Nevertheless, it has minimal impact on the participative process which by definition limits the use of lectures to introductions or summaries.

Another important visual aid is the **handout**. Learning can be reinforced by giving participants the essential content in a print form that covers some important element or reinforces some key points. In this sense it can be viewed as a facsimile of items written on the flip chart or the blackboard.

In distributing handouts, it is important to hand them out <u>after</u> the issue has been discussed. It is common nature to immediately read something one is given, even though the instructor may not refer to it or, in fact, tell the students to *"put it away for now."*

If the handout is passed out after the subject is discussed there is less likelihood of classroom disruption, since the handout provides the student only with a "record" of the discussion. They can refer to it later, though they may take a minute or two to look it over. Once they realize it merely duplicates what has already been covered, they are ready to move on to the next part of the course.

In more and more labor education programs, **videotapes** are being used. They can dramatize case problems, give tips on how to solve problems, stress certain key learning principles and even entertain the students. They obviously are good vehicles to help the visually oriented individuals and in this day and age are a familiar learning vehicle to students who have watched countless hours on television. The instructor must make sure, however, not to rely solely on a videotape to make his or her point. Videotapes should never stand alone! Without some type of related instructional activity, they represent passive learning which is always less effective than active participation.

An instructor can use these procedures to make certain the videotape is incorporated into the mainstream of the session:

- Introduce the videotape by telling briefly why you are showing it;
- Tell what the videotape is about, and suggest certain aspects the participants should look for;
- Prepare a series of questions for discussion following the videotape; with a large group you may use small groups to discuss different points; and
- Remember, a videotape should never stand alone without a good introduction and a follow-up discussion.

Handling Classroom Situations

One of the problems new instructors (and old ones too) face is how to handle disruptions in the classroom and criticisms both inside and outside the classroom. One way to approach these situations is to list some of the ordinary problems an instructor is confronted with, and try

to come up with two or three possible responses or solutions to the problem (another activity especially well suited to small groups).

For example:

1. A participant approaches you at lunch on the first day and complains that another participant is dominating the session and should be curtailed.

2. A group of three people, all sitting together in the back of the room, are constantly chattering during your session.

3. People have straggled in from the coffee breaks and you are having a difficult time covering your material.

4. The course has only been going for an hour when a participant says *"Who the hell are you anyway? You're just a member like us. Why should I listen to you?"*

5. At the end of the first session, a participant approaches you and says the course is going okay but you should include something on health and safety.

   5(a) At the end of the second session, the above participant gets two additional supporters and again asks you to include something on health and safety.

6. Three members in a class of 15 approach you and say that they need to leave early to attend another meeting of their local.

7. In a steward's training class, the participants are equally divided as to whether the role of the steward should be that of a judge or an advocate. After some lengthy debate, one of the participants says to you *"I've had enough of these arguments, give us the right answer."*

8. You have just reviewed the course agenda at the start of the session. One of the participants says, *"Let's skip the role of the steward. We all know what it is. I'm here to learn about the grievance system."* Several other participants nod in agreement.

9. No one wants to volunteer for the role playing exercise.

   9(a) You ask a question, but get no response.

10. The same two or three individuals respond to your open-ended questions.

    10(a) After you ask a question, everyone wants to have a say, people start talking among themselves, and confusion reigns.

11. Someone asks a question totally unrelated to the topic.

12. In a small group of five individuals, two are obviously disinterested and refuse to participate.

13. You have divided the class into four small groups; two groups are quickly ready to report but the other two have barely begun their deliberations.

14. Two of four small group leaders, when reporting their results, accuse the instructor of poorly wording the task (or of not adequately being available during their deliberations).

15. One workshop group has not done their task. Instead when asked to report, their leader says *"We didn't zero in on the assignment, instead we decided to look at a totally different issue which is much more important."*

16. Several members of the class do not return from the coffee break.

17. For about a quarter of the class, the course is mandatory and they obviously are not interested in what is going on.

18. Just after an explanation of the course objectives someone says *"I was in a similar program and it didn't work out. What is the difference with this course?"*

No one instructor will run into all or even most of these problems, but it is helpful to anticipate them, rather than be taken unexpectedly. Many training manuals list ways to counter these problems. They provide some clues as to how to proceed, but may mislead the trainer into believing that there is an "answer" to every problem. The suggested response or solution may not work for a variety of reasons and then the trainer may not have an alternative approach to use.

Another reason for not insisting on specific ways to handle these problems is because each trainer has an individual style. Some of the solutions may not fit the instructor's personality and will fall flat. (For those who may like to have some traditional answers to classroom problems, the appendix to this section offers possible solutions or responses.)

Finally, even individuals with limited experiences oftentimes can come up with better rebuttals or responses to problem situations than those suggested by experienced instructors.

Interventions

Interventions are anything a trainer does to improve the way the group is working and to maintain a class that is working well.[5] The instructor needs to learn how to recognize the causes of classroom problems and the best approach to "intervene" into these situations. The previous section gave several examples of specific classroom situations and suggested the class look at alternative responses. The instructor is constantly being faced by situations that require him or her to "intervene" -- make an instant appraisal of the situation and then decide what to do.

Fortunately, these are sometimes not of earth shaking proportions and are not crucial to the objectives of the session. The simplest are concerns dealing with the physical condition of the classroom or the food and drink arrangements. For example, the classroom is not set up properly and may in fact have limited possibilities for an ideal classroom structure - what does the instructor do? Or the coffee is not there prior to the session but comes along about 45 minutes into the class - what does the instructor do?

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[5]For this section on Interventions, the AFL-CIO Education Department uses a video produced by Pat Wilson and Bo Razak for a CWA Train-the-Trainer Program. The video is a series of six vignettes describing various classroom intervention situations. After each vignette there are three options of how to handle these situations. The class can offer its own "solutions" to the intervention scenes or can choose which of the three options is most suitable. The major learning points highlighted in the tape are: 1. Separating judgments and assumptions from the behavior indicators; 2. Determining whether the particular behavior affects the "task" of the group (the reason people have come together) or the "maintenance" of the group (the climate that is supportive of the work to be done); 3. Examining the goals, risks and consequences of interventions; and 4. Examining the issue of control as a major variable in the trainer's choices.

Situations dealing with the subject matter of the course are more significant. For example, you made a point not well received by the class -- they don't seem to get it. What should the instructor do? Should you: Repeat it again? Give a different example? Discard it and try something entirely different? Ask the class what is the problem? etc. This example illustrates the intervention concept. In any situation, the instructor has to decide what to do. He or she has to intervene into the situation and make a decision, usually choosing from a number of alternatives.

The process of choosing a particular intervention begins with an identification of a specific indicator. This indicator is a feeling, behavior or condition that signals something needs to be attended to or changed.

Example: You are giving a lecture and as you look around the room you get an uneasy feeling that it's not going over very well.

The indicator that gives you this feeling is:

Example: One participant has been looking out the window for the last five minutes.

The usual response to this indicator is to quickly make a judgment.

Example: The participant isn't interested in the lecture and is bored. He or she is too lazy to learn anything useful.

If you were to act on this judgment, you would have to ask the participant to pay attention or take some other action based on the assumption that the participant is the cause of the problem. It is at this point that you may have misjudged the situation. You don't know yet what the motivation of the participant is, nor have you examined how the training has affected the participant's behavior. You must go back to the objective description of the indicator.

Example: One participant has been looking out the window for the last five minutes.

Next, we must understand that the behavior or feelings present in a training group may be the result of several connected sources and are not necessarily the result of one person's actions or feelings. We must ask the question: *"What is it about the task or the group process that could cause a participant to behave in this way?"* **(This is the first filter.)** Specifically we must examine the indicator in the context of the training and look for the primary cause in the five sources present in any training program: the trainer, the participant, the content, the environment and the technique. **(This is the second filter.)**

To illustrate how these five sources might be analyzed, you might consider the following:

Trainer: Is the trainer presenting the material in a boring monotone manner?

Participant: Is the participant thinking about something else?

Content: Does the participant already know the material being covered?

Environment: Is something exciting happening outside the window?

Technique: Has the lecture lasted for more than 15 minutes? Is this the third lecture of the morning?

Answers concerning the source of the behavior leads to an identification of the primary cause(s) of the individual behavior. You have now defined the problem.

For example: Given that the source or primary cause is the **trainer**, the trainer could:

- change the pace or tone of voice; or
- make a joke about how uninteresting the lecture was; or
- move around the room while continuing to talk.

Given that the source or primary cause is the **participant**, the trainer could:

- call on the individual to answer a question on the topic; or
- ask the participant what is happening outside, or ask why is the participant being distracted.

Given that the source or primary cause is the **content**, the trainer could:

- ask the participant or other participants how the material could be more directly related to them, or be more interesting.

Given that the source or primary cause is the **environment**, the trainer could:

- go look out the window; or
- call a break.

Given that the source or primary cause is the **technique**, the trainer could:

- begin asking questions of the group; or
- change the activity to a more active one, like a role play or simulation.

This is a sample of the range of possibilities that become clear when a more systematic identification of the problem occurs.

While more experienced instructors, by definition, have had more opportunities to see these situations and hopefully make correct decisions, the new trainers should at least be aware of the impact of their decision (or what happens when the instructor chooses not to intervene). If the option chosen by the instructor does not seem to work out too well, then an alternative should be considered the next time the situation occurs. This is one skill that is honed only with experience. Problems, particularly involving student understanding of the material, can be minimized by the way the instructor handles the class and by sticking to the objectives of the course. These points will help a lot, but even in the best of circumstances not every student will be able to keep up with the class presentations. A good instructor will at least be able to recognize problem classroom situations when they occur and do the best he or she can to "intervene" to insure that the situations get resolved or at the minimum do not get out of hand.

Team Teaching

It is anticipated that in most instances new instructors will be paired up. In most cases this will put less pressure on any one individual and help reinforce and complement individual teaching attributes.

Team teaching has some obvious advantages. Perhaps the greatest is that having two people covering one set of materials will mean fewer points are missed. Two people make it easier to use the blackboard or the flip chart. If any of the problems mentioned above occur, the two instructors can usually look at multiple suggested solutions instead of just a few. Or, one of the instructors can back up the other's response.

Ideally the two instructors will complement each other. One may be better at using certain instructional techniques than the other. One may be experienced, the other somewhat inexperienced. Or the trainers may be knowledgeable about different parts of the subject matter. Sometimes cross-cultural teams or male-female teams can look at a situation from different perspectives. Some adult educators feel that the ideal is one dominant and one recessive trainer. They are afraid two dominant personalities may step all over each other (with two recessive personalities, nobody takes charge). However, if you plan who is responsible for which tasks, two dominant personalities will work well together.

Two individuals can make the session more effective. They can help each other keep on track; they can supplement the other's presentation and insure that all important points are covered. They can respond to questions from two different perspectives, a handy tool when a participant may not be fully satisfied with one type of response. They can help facilitate small group assignments.

Perhaps the most important advantage is that each instructor can help give effective and appropriate feedback on the other's training skills -- not a critical assessment, but constructive points that can be incorporated in future programs. To accomplish this, it is important that a team debriefing session be held at the conclusion of each day's program. Participants in the program may know good training when they experience it, but they may not be capable of critically providing valuable feedback to the teaching techniques used.

Most of the shortcomings of team teaching can be overcome by careful selection. Individuals may just be incompatible. Their teaching styles may be contradictory. One may be a stickler for details, the other may not follow the agenda very carefully, etc. Also, they have to learn to disagree in a way that is not confusing or contradictory to the participants.

A more experienced instructor must guard against "showing up" the newcomer. The less experienced instructor should not wait to be bailed out of tough situations. Certainly one individual should not contradict the other. And the only time to interrupt is when there is an obvious misrepresentation. (For example, if reference is made to the wrong section of a law.)

The key to effective team teaching is good preparation. Before the session, the two individuals need to thoroughly discuss, review, and practice the content. They need to know who is going to cover exactly what material, make sure that each understands the objectives of their session, who is going to use which teaching techniques, where they will be physically in relation to each other during the session, and in general how to handle any unexpected situations. Good detailed preparation is absolutely necessary.

Here are several of "problem" classroom situations that could crop up in team teaching. How would you handle these situations?

1. During the first break in the program, a participant approaches you and says: *"I think you're doing a good job, but the other instructor is the pits. Can't you do something?"*

2. Your team teaching partner keeps saying Section 31 instead of Section 21 and no one is picking up on it.

3. You have given out small group assignments, but as you go around to the various groups you find out that your partner has greatly modified your assignment to the group.

4. Your partner gives a response to a participant's question that you think is definitely wrong.

5. The women participants are addressing all their questions to the female instructor, the men participants to the male instructor.

To summarize, this section has covered three diverse topics directly related to the effectiveness of the instructor's performance. They can go a long way in making the course a success.

Stress was put on utilizing the flip chart or blackboard to help add a visual component to the instruction; the value of good handouts was also pointed out.

If the instructor does not know how to handle certain student behavior as it crops up or how to intervene in problem situations, it will undermine effectiveness. Though the title of this section is "Class Control" it does not imply that the instructor should be overly concerned with controlling a situation, that is, being concerned with always being "in charge." Certainly, the instructor should not allow the learning process to be disruptive, but the idea that the instructor should always be controlling the students is in conflict with a student-oriented approach to learning. Effective interventions will, we hope, diminish most of the class problems of boredom, inattentiveness or disruptions. But whenever problems do arise, the focus should be on

returning the student to a good training environment, rather than how the instructor can "gain control" of the situation.

Team teaching is sparsely used in labor education programs but is well suited to Train-the-Trainer programs. New instructors can be more easily assimilated into the process. Most of the problems that may arise can be alleviated through careful team selection.

All of these areas - teaching aids, class control and team teaching -- can be improved through practice under the principle "practice makes perfect". Though an instructor can never truly perfect the use of any of these three techniques, applying some of the tips and strategies found in this section should help make for better labor education programs.

SECTION 5

PROGRAM EVALUATION

Overview

Program evaluation deals with the evaluation of any labor education course, whether shop stewards training, collective bargaining, labor law or even a train-the-trainer program. This is in contrast to **personal evaluation** of the new instructor or facilitator who is involved in the program. This type of evaluation -- measuring the performance of the new instructor -- is handled in a separate supplement to this handbook which covers the duties and responsibilities of the person administering the Train-the-Trainer Program.

Evaluation means many things to many people. For the purposes of this handbook, evaluation refers to the processes by which learning itself and all elements of the learning transaction are measured.

In other words, evaluation refers to the various techniques and activities which:

- assist participants and the labor educator to measure the amount and kind of learning which has occurred; and

- assist the labor educator to gauge the effectiveness of the program itself (i.e., course content, environment and facilities, techniques, and visual aids used, etc.).

After some general comments on the reasons for evaluation, both traditional and non-traditional methods of measurement will be described in this section; then, some of the workplace or organizational factors that may prevent someone from effectively implementing what they have learned will be reviewed. The appendix to this section gives a sample evaluation that might be used in evaluating a labor education course. It is not presumed that this is any better than the hundreds of course evaluation forms already available; it might, however,

remind the evaluator of some of the points to stress or at least be cognizant of when evaluating a course.

Why Evaluate

Fundamentally what the instructor is trying to do is to determine whether the course has effected the desired change in the students. Each student comes into the course with a set of skills, attitudes and knowledge; they leave the course with, we hope, a new set of skills, attitudes and knowledge; the reason for evaluating a course is to determine what has changed.

For example, in a shop stewards training program, the course may be designed to improve the ability of the steward to better process grievances. At the end of the course did they learn how to better do this task? When they next process a grievance will they do a better job as a result of attending the school? (One caution that will be discussed later: perhaps some unforeseen workplace or organizational restraints prevent them from implementing what they learned.)

The process of evaluation actually begins with the identification of learning needs at the beginning of the course. Learning objectives are based on these needs. The rest of the program planning and course preparation is directed to the eventual delivery of a learning program designed to meet these objectives. This is why we say labor education is purposeful.

Given the above, labor educators need to look closely at the elements of the course to see what has contributed (both positively and negatively) to its outcome. Certain questions need to be raised, such as:

- Has the original need been reduced or removed?
- Have the learning objectives been met?
- Has there been a change in knowledge, awareness, attitude or skill, based on the stated objectives of the learning program?
- Are participants from the labor education program now using this new learning?

These basic questions lead directly to more specific questions on how to improve the component parts of the learning program. Included are such questions as:

- Was the level of the course content appropriate to the particular group of students?
- Was the performance of the instructor effective?
- Were the various aids -- handouts, visual aids, flip charts -- used effectively?
- What was the appropriateness or usefulness of various environmental considerations like location, schedule, meals, etc.?

These questions can't be answered unless we measure, and evaluate. Evaluation is important for other reasons. Unless self-evaluation is systematically built into learning programs, participants will find it difficult to assess their own progress. Since each participant must ultimately be relied upon to apply new learning, this personal assessment (usually called "self-evaluation") must occur.

Another useful function of evaluation is to identify unintended outcomes. Whether or not formulated learning objectives are met, additional objectives always crop up. Every labor educator alive has received a comment on the evaluation form that the individuals "got the most" from informal discussions about the labor movement generally unrelated to the objectives of the course. How can the instructor measure this against the objectives of the course. It may not have anything to do with the objectives of the course, but can indicate that the individual came away from the course with a positive note. It has some utility, but tells nothing about whether the individual can do a better job of processing grievances, for example.

How to Evaluate

There is clearly no single best way to evaluate. In fact, regardless of the kind of learning program involved, it is advisable to use a variety of approaches.

The specific approaches used will depend on such considerations as the style of the educator, the level of the participants, the amount of time available, and -- most importantly -- the nature of the learning objectives.

Basic and traditional evaluation techniques include observation, practice, informal discussion, questionnaires, and follow-up surveys.

Observation

Observation is the awareness by an instructor of what is happening in the class. Observation does not fall into the category of hard data gathering and should never be exclusively relied upon, but it is an important source of information and should be considered part of the overall evaluation package. This is especially true because it is one of the few avenues for on-going or continuous evaluation.

In its simplest form, observation may be a crude measure of class performance. Are the students responsive? Do they look alert? Are they coming up with good answers to open-ended questions? Are most of the class members responding, or just one or two individuals?

If the participants are coming back late for sessions, or obviously not paying attention, something is wrong. If the room is too small or poorly ventilated, it will be obvious long before participants get to the end-of-class questionnaire.

By keenly observing what is taking place in the class, the instructor can often deal with problems right "on the spot."

Practice

Practice is the work performed by participants during the program in role plays, through presentations and demonstrations. By observing and analyzing these activities, the instructor can get some indication of how the person might perform in the workplace.

Because of the emphasis on tasks and activities in student-oriented approaches in labor education, this is an evaluation tool that essentially occurs naturally in the course. During the course the instructor may ask the student to: chair a typical union membership meeting, deliver a report on the finances of the local union, plan a membership drive or how to get a political contribution from a member, how to interview a grievant in order to get all the facts, etc.

By carefully, but critically, watching what takes place during these "practices," the instructor can assess whether or not the individual understands the objective of the session, and more importantly, how they actually perform the task. Too often this type of on-going evaluation is overlooked or rarely considered when reviewing whether the program was successful.

Informal Discussion

In any course students will occasionally approach the instructor, either at breaks or at the beginning or conclusion of the class, and give him or her some casual or subjective observations about the class. Such off-handed remarks as: *"You know I never thought of that"* or, *"We have a similar situation that you discussed in our local and I'm going to try out the approach you suggested"* or, *"I think there's something you forgot to mention when you were discussing grievances . . ."* All are helpful evaluations of how the course is going.

Sometimes, the instructor can formalize this process by directing questions to individual participants or to small groups of participants. Specific questions about the applicability of the issues raised allows for more direct evaluative feedback to be obtained. It also allows the instructor an opportunity to clarify any confusion by using the feedback obtained from the class. By asking everyone to participate in this process, the instructor can confirm whether the individual informal discussions are truly representative of the entire class. Otherwise comments received from one or two individuals will sometimes lead

the instructor to assume that these comments represent the sentiment of the entire class, when they may merely represent particular situations or individual viewpoints.

Questionnaires

The most traditional of all of the evaluation tools is the questionnaire which typically asks the participants to evaluate the course on its last day or, too often, at the last minute. These course evaluations can give the instructor some insights into course structure, instructor skills, training materials and facilities, but they may represent the "GITO" phenomenon - Garbage In, Truth Out. Oftentimes they are poorly constructed and are merely a formality. They cannot accomplish the true purpose of an evaluation -- namely to determine whether the participants have learned what you set out to teach them -- because they are asked to assess the course objectives before they have had an opportunity to return to their union and practice their newly acquired learning skills. Again using the illustration of the shop stewards training course, the questionnaire tries to determine whether they are better stewards upon completion of the course. This obviously depends on how they do on the job; to ask them to judge whether they can do a better job before they can try out their new skills is to seek a subjective response. Typical questions such as what did you like best or least in the course, will ultimately depend on what works the next time they handle a grievance. Their answers at the conclusion of the course may have no real relevance to their real world situation.

So why do we evaluate in this fashion? Why do we hand out what are sometimes referred to as "smile sheets"?

John Jones, president of Organizational Universe Systems in California, gives three reasons.[6] The sponsors of the program want evaluations, the instructors want to

[6] In Training and Development Journal, December 1990, pp.19-21.

know how well they did, and the ratings look "valid." However, he lists 26 reasons why their usefulness is severely limited. The first five are:

1. Ratings don't correlate with transfer of training. No available research shows a clear relationship between end-of-course ratings and the extent to which participants apply training on the job.

2. Many raters are unqualified. Training participants do not have the background to supply valid judgments about the effectiveness of a training course. They know what they like, but they are usually uneducated about educational theory and methods.

3. Trainees have uneven comparative histories. Trainees usually have highly varied training experiences with which to compare a given course. What one person considers to be outstanding may appear ordinary to another; both may have valid reasons for their opinions.

4. Data are retrospective. What we remember may be highly inaccurate; our judgments about it may vary across time.

5. Responses are judgmental or subjective. Most end-of-course questionnaires ask respondents to make evaluations. What one person sees as useful another may see quite differently.

There are two positive reasons for using questionnaires. First, they can provide a method of measuring change from one learning program to another. This allows the instructor to better gauge the impact of any changes made in the learning program. And second, the questionnaire can provide a format for participants who may be more comfortable with the written than the verbal form of evaluation.

Follow-up Surveys

A better way to judge the effectiveness of the program is to follow-up with a survey after the individual has had an opportunity to practice what was learned. After being back to work for a month or two (or longer depending on the situation), participants will have had an opportunity to apply what they were taught. They may identify areas where the training helped them perform better and areas where they believe more or different training is needed. The follow-up survey can also be a source of ideas which occur to people only after they have had an opportunity to reflect on their experiences.

This is not to say that follow-up surveys do not have drawbacks. Perhaps the primary one is the difficulty in contacting the individuals after the course is completed. To combat this situation, instructors sometimes ask the participants to address an envelope to themselves and the instructor can mail it in a month or two.

Many of the subjective and personal judgments from the end-of-course questionnaire will likewise appear in the follow-up survey, but at least the individual has had an opportunity to determine whether the class was useful -- however he or she may define that term. Evaluation problems are compounded if the individual did not find the course helpful when he or she tried to apply its principles back on-the-job. To try to determine what went wrong is most difficult. Was the course poorly designed? Did it cover the wrong situations? or Was it poorly presented? These questions need to be answered, but to have an individual do more than just guess at the answers to these questions after several months have lapsed is to ask a lot.

Non-Traditional Evaluation Procedures

Here are a few other evaluation strategies and techniques that might prove helpful. The first gives an example of reviewing or evaluating a course long before its conclusion. The others are suggestions which might be tried if an instructor still finds the need to evaluate the course during the last portion of the program.

The Canadian Labor Education program utilizes a "diary" approach. Every day in a week-long program (the procedure could be used also in a day-long program) the students are asked, upon completion of the session, to write down their answers to such questions as: How do I feel about the way the course is going and what expectations (needs) of mine have been met? These evaluations (signed by the individuals) help enormously to modify portions of the program, repeat certain portions or follow up on specific points in the program, and particularly give the instructor a feel for the progress of the class. It is invaluable in attempting to correct or alleviate problems. The key features of the above approach is that it forces the instructor to do mid-session or mid-course evaluations rather than wait (as is usually the case) until the completion of the final session.

A variation of this technique (infrequently used, primarily because it takes a bit more time) is to break the class into small groups to respond instead of having individuals respond. Have each group discuss: what I've liked so far in the course or what I would like changed in the course; and then have them report out to the whole class.

This technique has several advantages. The comments are anonymous. The whole class sees (after each group reports out) some of the other concerns of the participants. The instructor can then determine whether there are significant agreements on what has transpired during the course. A discussion of where to go next can then involve the entire class.

But if you only have a few minutes left and did not plan too far in advance, and you're hurriedly passing out evaluations while trying to make some closing comments, Carol Binknowski, a communications consultant, has some teaching tips:

She says that just as the first five minutes of a course can set the overall tone of things for better or worse, so the last five minutes can create a positive or negative lasting impact.

She gives two examples of closing activities that should only last about ten minutes. These student activities are conducted after a brief summary of the course.

1. **A participant game that allows for group interaction**. Have half of the class stand facing outward in a circle. Then have the remainder of the participants pair off with them. Ask each pair to reveal to each other what they thought was most valuable in the course. Call time in one or two minutes, and have the outward circle move over to the next person to repeat the exercise. Then get a sample of the responses

2. **Group summary**. Give each participant a piece of chalk, and ask them all to go to the blackboard and write one word or draw a picture that summarizes what they got out of the course ("think," "create", "communicate", etc). Quickly compare responses.

Upon completion of the exercise, make a brief final statement, consisting of two or three sentences, thanking the class for their participation. Anything longer will detract from the overall impact of your closing.

Obstacles to Implementation

After having reviewed different methods of evaluation one important point needs to be stressed. Even if the student achieves new knowledge on how to perform his or her job, even if he or she is skillful on how to do the job and even if an attempt is made to use that knowledge on the job -- he or she may not be successful. Why? A number of factors are beyond the control of any union participant and may prevent the implemention of the knowledge or skills. A few specifics from a shop stewards training program may help explain this point.

Some specific problems that may arise:

a. Individual shop stewards fill out grievance forms infrequently and may forget rules.

b. Shop stewards do not receive immediate feedback on how well they have prepared the grievance forms. They usually only see the grievance forms after the case is settled. Most grievance forms

submitted with errors are corrected by the Chief Steward. Corrections frequently do not include the reason for the changes made.

c. Shop stewards may not receive all the information from the grievant needed to complete the grievance form.

d. Updated contract interpretations are not consistently available to all who need them.

e. Work on grievance forms is interrupted for higher priority job tasks.

f. Evaluation of the shop steward's job performance does not include an evaluation of how well the grievance forms are prepared.

g. Overall, shop stewards encounter no negative consequences from incorrect grievance forms.

h. There may be positive rewards for shop stewards who devote the time to other job tasks and do not take the time needed to correctly fill out grievance forms.

These impediments to the effective implementation of course information are rarely discussed (generally there is not enough time) but if the bottom line is, has the program made for a better or more efficient union, it is important to make the students aware of these factors so that if they do crop up on the job, they will at least be aware of them.

After all is said and done about the importance of good evaluation, it is good to remember that not everyone who attends a labor education program is attending with the objective of performing better once they get back on the job. Some may be attending because it is a "benefit" bestowed upon them by the local, others may treat it as a symbolic organizational ritual, while others may be interested in producing some internal changes in the values and beliefs within the union rather than external changes in behavior and performance.

- If the program exists solely as a "perk" for participants, it's entertainment, not training. It should be evaluated by how much the audience applauds or boos.

- If the content is symbolic rather than substantive, it is some sort of religious service, not training. It should be evaluated by how good the faithful feel about it.

- If the content is designed to install beliefs and values, it's indoctrination, not training. It should be evaluated by the degree of robotlike conformity participants exhibit.

- But if training is designed to improve performance, then measuring on-the-job results, though not easy, remains the single best method of evaluating its effectiveness.[7]

Primarily, evaluations need to determine whether the class did what it started out to do. Did it meet its objectives? If this thought is constantly before the trainer/instructor, the class will not only stay on target, but will make the even more important contribution of helping build better and more effective unions.

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[7]Taken from a letter from Paul Miller in Training and Development Journal, December 1990, page 6.

APPENDICES

Section 1:
APPENDIX A

SAMPLE LEARNING NEEDS QUESTIONNAIRE/SURVEY USED IN STEWARDS TRAINING PROGRAMS

(Developed by the Canadian Labour Congress)

1. As steward
   I have to know _____
   I have to know _____
   I have to know _____
   I have to know _____

2. As steward
   I have to know how to _____
   I have to know how to _____
   I have to know how to _____
   I have to know how to _____

3. As steward
   I have to work closely with _____
   I have to work closely with _____
   I have to work closely with _____
   I have to work closely with _____

4. As steward
   I need to know more about _____
   I need to know more about _____
   I need to know more about _____
   I need to know more about _____

5. As steward
   I need to know better how to _____
   I need to know better how to _____
   I need to know better how to _____
   I need to know better how to _____

6. As steward
I have to understand_____
I have to understand_____
I have to understand_____
I have to understand_____

7. As steward
I need to better understand_____
I need to better understand_____
I need to better understand_____
I need to better understand_____

8. As steward
My greatest difficulties are related to _____
_____
_____
_____
_____

Section 1:
APPENDIX B

ALASKA SETTLEMENT GAME

Give students the following imaginary situation:

> **"Imagine that twenty people are going to establish a community in Alaska. There is nothing there now, except some buildings that could be used for temporary living quarters. There is potential wealth in natural resources, recreation and tourism, and agriculture. The location of the community is 300 miles inland from the sea. No additional information is available."**

Summarize this information on the flip chart or blackboard.

Ask the students to identify the **20 occupations** they think are most important to establish this community.

1) Have them do this **individually**.

2) Have the students move into **groups of five or less** at tables or in a circle of chairs. Direct them to come up with a list of 20 occupations for their group.

3) Have each group **select a reporter** to convey their results to the class.

The instructor lists on the flip chart or blackboard the occupations chosen by the first group. Each succeeding group then compares its list to the one on the flip chart indicating which occupations are similar and adding new and different occupations to the list. This process continues for each group.

The instructor then summarizes by indicating which occupations were identical among the groups. **NOTE:** Do <u>not</u> be concerned if the final agreed upon list has fewer than 20 occupations.

Summarize the objectives of the exercise:

1) Familiarize students with the **small group mode** that will be used throughout the session.

2) Begin the program with a **non-threatening**, but participative exercise.

3) Show that **collective (group) decisions** are often superior to individual judgements.

Section 1:
APPENDIX C

RED/BLUE GAME

Group Exercise

Setting Up and Conducting the Exercise:

a) As soon as the group assembles, the instructor asks them to participate in a learning exercise designed to raise a number of points pertinent to the course.

b) Divide the participants into two groups - Group A and Group B.

c) Bring the participants' attention to the objectives of the learning exercise as already written on a flip chart:

> *"The purpose of this exercise is for each group to accumulate as many points as possible."*

d) Explain that both groups will have eight opportunities to gain points.

To start, each group will have three minutes to choose a color - Red or Blue. They may choose a color in any way. The only rule is that the decision must be made within the time limit and communicated privately to the observer stationed nearest each group. (Instructors serve as observers.)

e) Points will be accumulated on the basis of the combination of colors chosen by Group A and Group B, thus: (on a flip chart or blackboard)

Group A		**Group B**
+3 Red.	and.	Red +3
+6 Blue.	and.	Red - 6
-6 Red.	and.	Red +6
-3 Blue.	and.	Blue - 3

For example, if in round one, Group A chooses Blue and Group B chooses Red - Group A would receive +6 and Group B would receive -6.

f) Assure that the task is clear. Begin the first round. Tally points, round by round, using the following chart (prepared in advance).

	1	2	3	4	5	6	7	8	Totals
Group A									
Group B									

g) Allow three minutes for each round.

Never use the following trigger words - "game", "team(s)", "win".

The instructors are not to give additional information or hints to the participants.

Anticipated Outcome(s):

Invariably, neither group achieves the potential total of 24 points - which can only be achieved if each group chooses "red" each time.

Almost invariably, participants immediately forget the objectives of the exercise and concentrate on beating the other group. They tend to compete and opt for lose-lose strategies.

Debriefing of Group Exercise

a) Tally the points. Point out that the potential of 24 points - which meets the objectives of the exercise - was reached by neither group, much less each group.

b) The instructor initiates discussion of the exercise by using the following question directed to the participants: "*What happened? Does anyone have any idea why the groups did not achieve the purpose of the exercise?*"

c) Discussion should bring out the following point, perhaps among other points: Participants were not clear about their "objectives."

Section 1:
APPENDIX D

INTRODUCTION TYPE WARM-UPS OR ICEBREAKERS

Name, Rank and Serial Number

In union terms, this means asking each person to get up and introduce himself or herself. Tell them to give their name, union position, state, where they work, or whatever is relevant to the class.

Rating: OK. Takes little time. Doesn't do a lot to get people feeling relaxed or interested in one another.

Pairs

Pair people up with someone they don't know, give them 7 to 10 minutes to get acquainted. Then ask each person to introduce his or her partner to the entire group -- name, union, title/position, plus one interesting fact you have specified (how long has this person been a union member, or what is their reason for attending the class, etc.)

Rating: Good. Assures that everyone in the group has gotten to know one other person. Sets tone that participants in the group are important. Takes more time than "Name, Rank, and Serial Number."

Walk-around

Give everyone a 5 x 7 card, and ask them to write down one fact in each of the four corners. Example: union position, hobby, favorite sport, where would you most like to be right now? Have them pin the cards on their shoulder or lapel, then ask them to get up and circulate around the room, saying hello to each other and talking about their hobby, chatting, etc. This takes about ten minutes.

Rating: Good. Mixes everyone up. Not suitable for some ultra-serious groups.

Section 2:
APPENDIX

TEN GENERAL PRINCIPLES OF LEARNING

(Taken from the Canadian Labour Congress)

1. Humans are Learners By Nature

There may be challenges and risks which tend to frighten us off, and we must, often painfully, unlearn some things in order to learn others; but the human potential for learning can always be uncovered if we create the right conditions.

2. We Learn Fastest What We Need Most

Workers whose health and safety is in danger learn their rights in the workplace eagerly and quickly. As with a child learning to ride a bike, there is an obvious need and purpose for the learning. High school students taking trigonometry will learn what they need to pass the exam, but have no immediate use for the knowledge.

3. We Learn Best By Doing

Knowledge and skills which are practiced are retained. Even mathematical theories must be tested against real problems in order to be thoroughly learned. Learners meet greater success when they are given frequent opportunities to put their learning into action.

4. We Learn More When We Participate in the Learning Process

Passive learning systems -- those that rely on one-way communications from teacher to student -- are inefficient. When learners become involved in the process and help to direct it, the process works better. The proven effectiveness of labor education is grounded in participation.

5. We Learn the New Through the Old

We get better learning results when we build on what we already know. This principle is, in fact, the basis of all discovery. We proceed from the known to the unknown; we investigate and compare; we form a theory, and then try it to see if it works.

6. We Learn Better When We Know Where We're Heading

Learners need route maps. If we have a clear objective in mind, we will be better prepared to bear the pain and hardship suffered on the journey.

7. Feedback Keeps Learners on Course

Learners proceed better and faster when they can see how well they're doing. They need frequent chances, during the learning process, to evaluate or measure their own progress and see where they are in relation to the objective.

8. Errors Help the Learning Process

The chance to make our own mistakes, recognize our own mistakes and correct our own mistakes is part of the feedback process which keeps us on course toward the learning objective.

9. The Most Useful Learning is Learning How to Learn

What we may learn in a classroom, or during a program -- no matter how stimulating -- is only a small sample of what we can learn by confronting real and changing problems in our daily lives. Knowing how to learn -- and to keep on learning -- is a precious knowledge.

10. Learning is Life; Not Preparation for Life

This pretty well sums up the preceding nine principles.

Section 3:
APPENDIX A

APPLICATION OF THE TEACHING TECHNIQUES USED BY THE BRITISH TRADES UNION CONGRESS

This facilitator training manual uses a modified version of the Labor Education Techniques developed by the Education Department of the British Trades Union Congress.

The program uses a simple four-step process:

1. Determine the objectives of the session based on a perceived training need;

2. Use student-oriented exercises or tasks to generate ideas and approaches to meeting the objectives;

3. Add to this input by using effective questions designed to substantiate, challenge or add to the information; and

4. Summarize the question and repeat how the information generated by the students helped to meet the objectives of the session.

The British system similarly begins with the establishment of aims (objectives) but this is oftentimes preceded by an "Information/ Discovery Process" which ties the workers' work experiences to the topic so the course relates directly to their problems.

The students are asked to find out certain information from their own workplaces and bring this "discovery" into the class. It is not extensively used in the United States though it can be a very productive procedure.

To illustrate: the students may be asked to do a check of their workplaces to find out how the company has handled the introduction of new equipment over the past couple of years, or the student would do an analysis of the change in the composition of the workforce. Are there more jobs? Any change in job classifications? Any utilization of part-time employees? etc. Rather than abstractly looking at situations, this technique enables the students to tackle real situations.

The British System then develops a variety of small group tasks, problem-solving situations or case studies. This generates new information and/or provides for analysis/solutions to problems. Five different types of small group activities are used.

The first category is **COMPREHENSION** which is asking the group to draw out key points from a handbook, pamphlet, or guide, rather than "presenting" this information.

> **To illustrate:** if the objective is to understand how the union works, the students are asked to look through their union contract and by-laws and answer such questions as: Where does the highest power in your union lie? What is the job of the executive council of your union? How do shop stewards get their positions?

The second category is **ATTITUDE APPROACH** which is asking the group to set out their views on a particular topic.

> **To illustrate:** students could be asked their own impressions of union democracy; how the news media report on unions; or what is the attitude of women working in non-traditional jobs. Some of the statements raised in a session on union democracy might include: unions should have more control over their members; union leaders don't represent the views of most of their members; or the only way to achieve equality for women in trade unions is by positive discrimination. These statements hopefully generate active discussion of their merits or deficiencies.

The third category is **PROBLEM-SOLVING** in which problems are set before the group and they are asked what steps they would take to resolve them.

> **To illustrate:** the class may be asked to develop a strategy or plan on how to handle a new chemical that is brought into the plant.

The fourth category is **STRATEGY/PRIORITIES** which asks the group to set out their priorities for change and their strategies for action. Though similar to problem-solving it takes the situation one step further. In the above example rather than just looking at the

immediate concern of a new chemical being brought into the plant, the class would be asked to develop a policy to prevent this from occurring in the future.

A number of **additional illustrations** can be cited. For example, in any organizing campaign certain strategies need to be developed regarding the issues in the campaign: when and where to target the card signing push, what kind and type of information will handed out, etc. A new member program is another area where planning must be done ahead of time: where and when to hold it, etc. Small groups can be utilized to get the students to establish priorities and develop long run strategies.

The fifth category is the use of **CASE STUDIES.** Though often used in conjunction with role playing, the process can also be used with small groups to get their collective opinions. It is an especially good technique when the case involves some alternative strategies that need to be determined ahead of time.

To illustrate: in the plant there may be strong reason to suspect that there is undergirding of racial discrimination. Given some basic facts of the situation, the small groups can determine alternative methods of getting resolutions to this problem. This could require selecting from such options as filing discrimination charges, conducting joint labor management training, asking the company to develop an affirmative action program, etc.

The results of these activities or exercises are reported by each small group back to the entire class for critique and review. (Unlike the United States system, the reporters are often challenged by the class to support their contentions.) The instructor's role is to insure a complete and thorough discussion and a final product that is generally acceptable.

The session(s) is concluded with a restatement of the problem (aim of the course) and a review of the outcomes or solutions and any suggestions for further actions.

Section 3:

APPENDIX B

TWO EXAMPLES OF "NON-TRADITIONAL QUESTIONNAIRES"

Example 1:

Read each statement and indicate whether you agree or disagree.

As a shop steward:

		AGREE	DISAGREE
1.	Your main responsibility is to your union and not to your members.	☐	☐
2.	You have a duty to educate the rank and file membership.	☐	☐
3.	You owe no responsibility to your employer.		
4.	You should make sure that your members as well as management stick to agreements.	☐	☐
5.	You should raise with management every grievance brought to you by any of your members.	☐	☐
6.	You should keep the union informed of shop floor issues.	☐	☐
7.	You should try to influence management's decisions and plans in the interests of your members.	☐	☐

Example 2:

WHAT IS A GRIEVANCE?

Listed below are some common definitions of a grievance as found in collective bargaining agreements. Rank the list from 1 to 4 with one being the best definition.

"A grievance is . . . ."

( ) *"a problem which properly can be handled under the grievance procedure."*

( ) *"a complaint or dissatisfaction arising from the interpretation or application of the contract."*

( ) *"any dispute, disagreement or difference arising between any employee or the union and management."*

( ) *"any controversy, dispute, or difference between the management and the union, involving hours of labor, wages and working conditions."*

Section 4:
APPENDIX

SUGGESTED RESPONSES TO CLASSROOM PROBLEMS

Though the best responses to problem situations generally come directly from the students, here are some suggestions on how to handle some typical classroom situations that may be helpful to new instructors.

1. **Handling silence -**

   Find out where class is coming from. Ask questions. If no response, wait awhile -- generally someone will respond; or make a suggestion that the group move on to the next step.

2. **Handling conflict -**

   Decide if it is "creative" conflict. That is, people are arguing but are listening to opposing points of view. Agitation is directed at ideas not people. This type of conflict can be condoned. However, if people are attacking each other, try to get them to focus their energy instead on solving problems. Interpersonal conflicts belong outside the class.

3. **Discouraging irrelevant discussion -**

   If questions are deemed unimportant to the topic or do not reflect, in your opinion, the position of the majority in the classroom, try to handle the question on an individual basis later in the session or perhaps even privately.

   Or ask individuals: *How does your situation (what you're saying) fit into our discussion? I'm not sure how your situation is similar to the current discussion.*

4. **Discouraging one or two participants from dominating the session -**

   Possible instructor approaches:

   "Frank and Neil have stated their point of view at some length. How do the rest of you see the situation?"

"Heather has worked pretty hard at giving her thoughts. What do some of the rest of you think?"

"Jim, (a member who indicated he wanted to talk) *you look like you want to say something. Is that right?"*

"Claudette, (had her hand up) *you want to get into this. Let's give Claudette a chance."*

In general, the group will handle the situation if the leader indicates by his or her behavior that he/she wants all participants to talk.

5. Discouraging private conversations -

Side conversations are often indications of keen interest in the subject when the participants are not able to wait their turn to speak. They are usually controlled by the leader by asking the participants involved to share their ideas with the whole group.

"I don't believe all of us get the point you sisters were making. Would Margie repeat it for all of us?"

"We couldn't hear you back here, Red. Would you tell all of us about it?"

"We were having an interesting talk up here in the front. Would you fellows go over that again for the rest of the group?"

6. Handling latecomers -

After meeting, ask why they are always late or *"what would make the session important enough to be on time."*

7. Handling someone who is constantly interpreting someone else's comments -

Insist on letting the person being "interpreted" continue talking.

Ask the person "interpreted" if the "interpreter" heard correctly.

8. Handling a busybody who is always running in and out of session -

Deal with the individual outside of meeting.

Have other students exert pressure for busybody to remain in the meeting.

9. Dealing with disruptive trainees -

Try eye contact.

Move toward them - deliver your remarks right in front of them.

Get person directly involved in session.

Confront them during break.

If all else fails, tell them to shut up or get out.

Section 5:
APPENDIX

SAMPLE EVALUATION FORM FOR A LABOR EDUCATION CLASS

I. If you had to list the two most important things you got out of this course, they would be:

1. _____

2. _____

II. a. What would you say was your objective in taking this course:

_____

_____

_____

b. Was your objective achieved? Indicate on the scale.

Totally Achieved	Somewhat Achieved	About 1/2 was Achieved	Somewhat Unfulfilled	Totally Unfulfilled
|	|	|	|	|

III. There are four primary factors that determine whether the (your) course objectives were achieved:

1. the instructor;
2. the content of the course, including materials, handouts, visual aids, organization of course, etc.;
3. the students - their interests, willingness to learn, level, attitude, etc; and
4. the environment - length of session, rooms, food, breaks, temperature, etc.

For each of these factors, give your evaluation of how they may have attributed to achieving <u>your</u> course objectives

	Positive <u>Points</u>	**Negative <u>Points</u>**
INSTRUCTOR	_____	_____
	_____	_____
	_____	_____
COURSE CONTENT	_____	_____
	_____	_____
	_____	_____
THE STUDENTS	_____	_____
	_____	_____
	_____	_____
THE ENVIRONMENT	_____	_____
	_____	_____
	_____	_____

IV. Any other comments:

_____

_____

_____

_____

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Publication No. 0

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